Assister Training Instructions: A Guide to Access and Complete Assister Training for the Federally-facilitated Marketplace

A. Introduction

As a Navigator, certified application counselor (CAC), or in-person assister[1] in the Federally-facilitated Marketplace (FFM) or in a State Partnership Marketplace (collectively referred to in these instructions as Assisters), you are required to complete certain training courses and assessments before providing consumer assistance. The training required for Assisters is hosted by the Medicare Learning Network® (MLN) Health Insurance Marketplace Learning Management System at http://Marketplace.MedicareLearningNetworkLMS.com. These instructions provide guidance on how Assisters can register with MLN and complete all required online training courses and assessments for certification.

B. Account Creation and Training Completion

1. Create an Account and Register for Training

If you have not yet created an account on the Medicare Learning Network® (MLN) website, complete the following steps to create an account and register for the training required for your specific Assister role:

Step 1. Open an Internet browser and go to the MLN website (http://Marketplace.MedicareLearningNetworkLMS.com).

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[1] The term *in-person assister* is used in these instructions to refer to the regulatory term *non-Navigator assistance personnel*.

Step 2. Select the Create Account link as shown in the exhibit below:

Step 3. Enter your MLN login ID (user name) and password. If you already have an MLN account, skip to Step 5 to modify your existing MLN login ID to reflect your new Assister ID number, if applicable.

    a. For all Navigators, in-person assisters, and CACs, **your MLN login ID must be the 13 character alphanumeric Assister ID number created by CMS and assigned to you by your organization.** If you are not sure what your Assister ID number is, contact your organization for additional information. Make sure that you enter the correct Assister ID number as your MLN login ID to ensure that the appropriate curriculum is assigned to your account. Please note that Navigators and Federally funded Enrollment Assistance Personnel must obtain a new, HIOS-generated Assister ID number before completing training.

    b. Your password must contain a combination of upper and lower case letters, numbers, and at least one special character.

Step 4. Complete the remaining required fields, which are marked with a red asterisk.[2]

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[2] NPN Number is only a required field for those who select Agent/Broker/Web-Broker for their User Type/User Role. Assisters should not provide a NPN Number.

a. Select your User Type/User Role, as shown in the exhibit below. You may choose between English (available in September 2014) or Spanish (available in October 2014) roles for Navigators, certified application counselors, and in-person assisters. This selection will determine which training is auto-assigned to your account.

Create New Account

* Login ID	
* Password	
* Confirm Password	
* First Name	
Middle Name	
* Last Name	
* Email Address	
* Confirm Email Address	

* Work Phone

* U.S. State

* Postal Code

➡ * User Type/User Role

(?) NPN#

* Organization Type

Agent/Broker/Web-Broker - Individual Market and SHOP
Agente/Corredor/Web-Corredor - El Mercado de Seguros Individual y el Mercado de Seguros SHOP
Agent/Broker/Web-Broker - Individual Market
Agente/Corredor/Web-Corredor - El Mercado de Seguros Individual
Agent/Broker/Web-Broker - SHOP
Agente/Corredor/Web-Corredor - SHOP
Navigator - Individual Market and SHOP
Navegante - El Mercado de Seguros Individual y el Mercado de Seguros SHOP
In-Person Assistance - Individual Market and SHOP
Asistencia en persona - El Mercado de Seguros Individual y el Mercado de Seguros SHOP
Certified Application Counselor - Individual Market and SHOP
Consejero Certificado para la Solicitud - El Mercado de Seguros Individual y el Mercado de Seguros SHOP

(?) * Organization   ⬒ Select

b. All Assisters should select Grantee Organization as their Organization Type using the drop-down menu, as shown in the exhibit below.

* User Type/User Role	Navigator - Individual Market and SHOP ▾
(?) NPN#	
➡ * Organization Type	Grantee Organization ▾
	Employer
	Grantee Organization

(?) * Organization   ⬒ Select

c. Select your Organization by completing the following steps. All Assisters should select Marketplace as their Organization:

   i. Click the Select link next to Organization, as shown in the exhibit below:

* User Type/User Role   Navigator – Individual Market and SHOP   ▼

NPN#

* Organization Type   Grantee Organization   ▼

* Organization   ⊡ Select   ⬅

ii.   In the pop-up window that appears, leave the search field empty and click the Search button, as shown in the exhibit below:

Select Organizations   ×

Perform a search to find organizations. Select one or more organizations, and save.

Find Organization:

[   ]   Search   ⬅
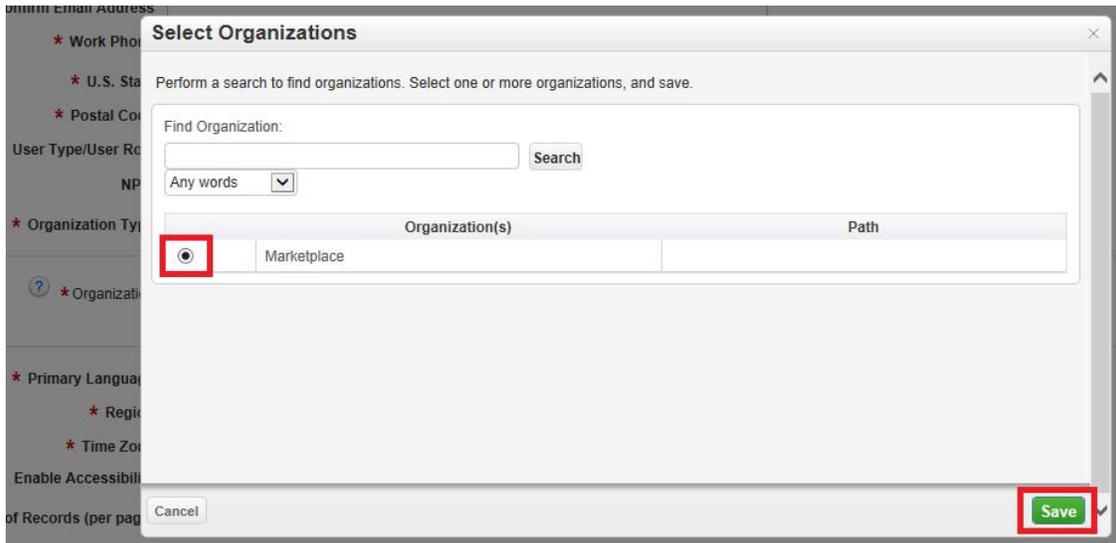
Any words   ▼

Cancel   Save

iii.   Select the button next to "Marketplace" then click Save, as shown in the exhibit below:

d. Back on the Create New Account page, confirm the auto-populated information in the Primary Language, Region, and Time Zone fields, as shown in the exhibit below:
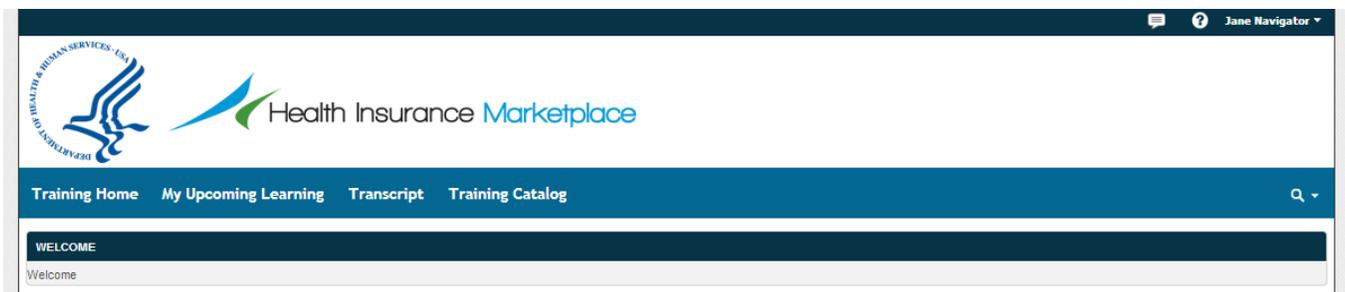

e. Click the Create button to finish creating an account.

  i. If all information was entered correctly, a welcome screen will appear, as shown in the exhibit below:

ii. The system will automatically assign the appropriate training curriculum to your account within 15 minutes of account creation.

iii. Each time you return to the MLN website, you must enter your MLN login ID and password to log-in and access your training curriculum.

Step 5. If you already have a MLN account, complete the steps below to modify your existing MLN login ID to reflect your new Assister ID number, if applicable:

a. Login to your existing MLN account and navigate to the My Account page by selecting the link in the upper right corner of your screen, as shown in the exhibit below:

b. Select the Edit Login ID button, as shown in the exhibit below:
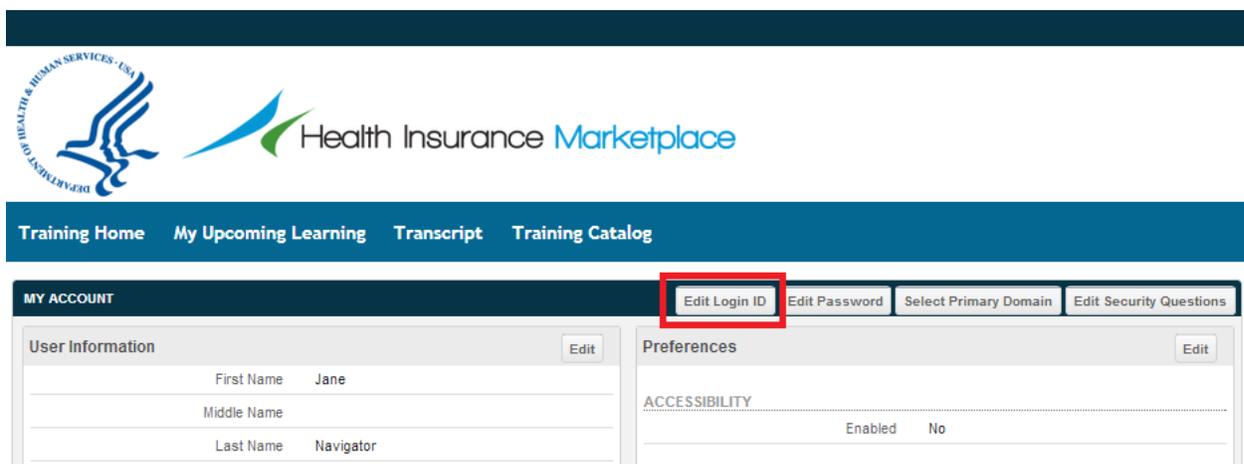
c. In the Current Login ID field, enter your current login ID. In the New Login ID field, enter the 13 character alphanumeric Assister ID number created by CMS and assigned to you by your Navigator organization, in-person assister organization, or CAC-designated organization (CDO). **Your MLN login ID must be the Assister ID number created by CMS and assigned to you by your organization.** Then click Save. See the exhibit below for more details:
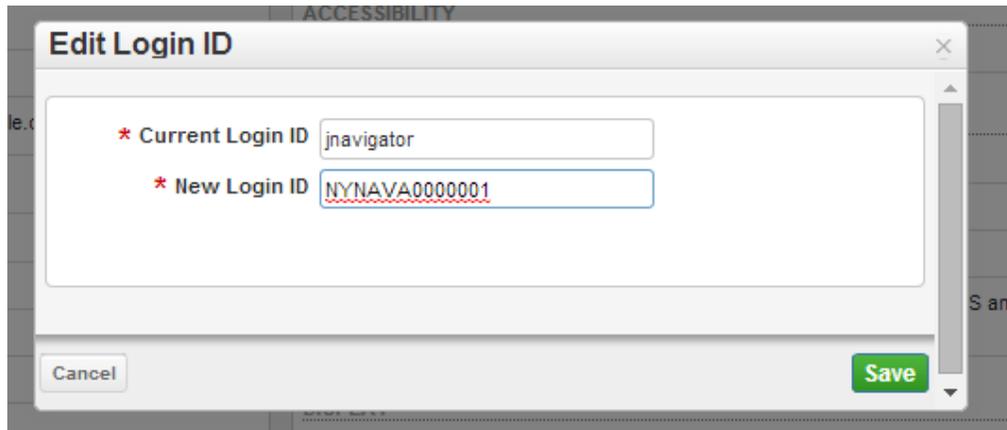
d. Once you have saved your new login ID, return to Step 4 above to confirm that your other account information (e.g., name, contact information, User Type/User Role, Organization Type) is accurate before completing your assigned training.

2. Complete Training

Once you have created a MLN account and logged in to the MLN website, use the following steps to complete your assigned training. The examples shown are for the Navigator Curriculum:

Step 1. Go to the My Upcoming Learning page, and then click the hyperlinked title for your assigned curriculum, as shown in the exhibit below:
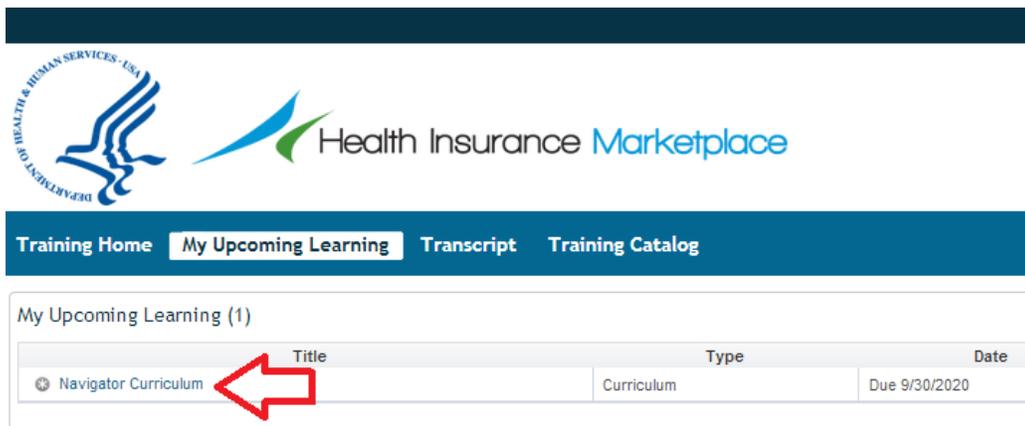
Step 2. To enroll in your assigned curriculum, complete the following steps:

a. Click the Enroll button, as shown in the exhibit below:

Navigator Curriculum

You have one or more required training assignments for this item. You may have completed this item for a previous train
training period.

Enroll

Description:

The Navigator and In-Person Assistance Curriculum covers an overview of the training and certification program, health in
eligibility and enrollment, the Standard Operating Procedures manual, assisting consumers in the Individual and SHOP Mark
vulnerable and underserved populations, working with consumers with disabilities, community outreach, privacy and secu

⊕ **Required Training Due**
This item is a required item, due within the training period listed below.

b. Click the Access Item button, as shown in the exhibit below:

Navigator Curriculum

You enrolled in this item on 8/25/2014.

You have one or more required training assignments for this item. You may have completed this item for a previous trai
training period.

Access Item   Cancel Enrollment

Description:

The Navigator and In-Person Assistance Curriculum covers an overview of the training and certification program, health i
eligibility and enrollment, the Standard Operating Procedures manual, assisting consumers in the Individual and SHOP Mar
vulnerable and underserved populations, working with consumers with disabilities, community outreach, privacy and sec

⊕ **Required Training Due**
This item is a required item, due within the training period listed below.

Step 3. Once you have enrolled in your curriculum, you will be able to enroll in the curriculum's first course. Note that courses must be completed in order and you will not be able to enroll in a course until you have completed the courses and assessments that come before it. To enroll in your curriculum's first course, complete the following steps:

a. Click the hyperlinked title of the first available course, then click Enroll, as shown in the exhibit below:

Training Overview

You must enroll in this item if you want to access it.

Enroll

Description:

The Training Overview introduces the Marketplace training and certification program for consumer assistance entities. The course includ (2) what to expect from the courses, exams, job aids, and additional resources; (3) the roles and responsibilities of the three types of co available to each entity; and (5) how to act in the best interest of consumers. There is no exam for this course.

b. Click Enroll once more in the new window that opens, as shown in the exhibit below. You may keep the default settings that are in place for Course Credit Options and Course Mode Options.

Enroll

Enroll

Review the information below to ensure that you are enrolling for the correct course/item. Then select the options you want (if options are displayed) and click Enroll.

Title Training Overview

Description The Training Overview introduces the Marketplace training and certification program for consumer assistance entities. The course includes information on: (1) how to navigate the training; (2) what to expect from the courses, exams, job aids, and additional resources; (3) the roles and responsibilities of the three types of consumer assistance entities; (4) the funding streams available to each entity; and (5) how to act in the best interest of consumers. There is no exam for this course.

Course Credit Options ● Credit ○ No Credit

Course Mode Options ● Normal ○ Browse ○ Review

Cancel   **Enroll**

Step 4. To begin the first course, complete the following steps:

a. Click the Open Item button to proceed with taking and completing the course, as shown in the exhibit below:

Training Overview

You enrolled in this item on 8/25/2014. [Cancel Enrollment]

[Open Item]

Description:

The Training Overview introduces the Marketplace training and certification program for consumer assistance entities. The course in (2) what to expect from the courses, exams, job aids, and additional resources; (3) the roles and responsibilities of the three types available to each entity; and (5) how to act in the best interest of consumers. There is no exam for this course.

b. Note that if you leave before completing a course's curriculum, your place will be bookmarked and you will be able to continue from that point when you return. Please note that if you leave before completing a course's assessment, your place in the assessment will not be bookmarked and you will have to start the assessment from the beginning.

c. When you return to the curriculum after logging out, you will see any courses or assessments you have started as well as those you have completed, as shown in the exhibit below:

Required Training Due

This item is a required item, due within the training period listed below.

Assignment Type			Trainir
User Group		9/30/2020 11:59:59 PM	

Required

Below are required activities for this curriculum that must be completed in the order that is specified.

Order	Title	Type	Status	
1	Training Overview	🖥	Completed	
2	Health Insurance Basics	🖥	Completed	
3	Health Insurance Basics Assessment	🖥	Completed	
4	Affordable Care Act Basics	🖥	Started	
5	Affordable Care Act Basics Assessment	🖥	Not Enrolled	
6	Marketplace Basics	🖥	Not Enrolled	

Step 5. To navigate through a course, use the following tips and information:

a. Read the information provided on each slide of the course and use the Next button to advance through the slides, as shown in the exhibit below:

b. Complete the Knowledge Checks found throughout the course, as shown in the exhibit below. These questions are designed to gauge your understanding and retention of course curriculum by applying the information to real world situations.

Knowledge Check

Which one of the following types of health insurance plans is NOT a type of managed care plan?

Select the correct answer and then click Check Your Answer.

○ A. Fee-for-service (FFS)

○ B. Point of service (POS)

○ C. Health maintenance organization (HMO)

○ D. Preferred provider organization (PPO)

✓ Check Your Answer   Reset
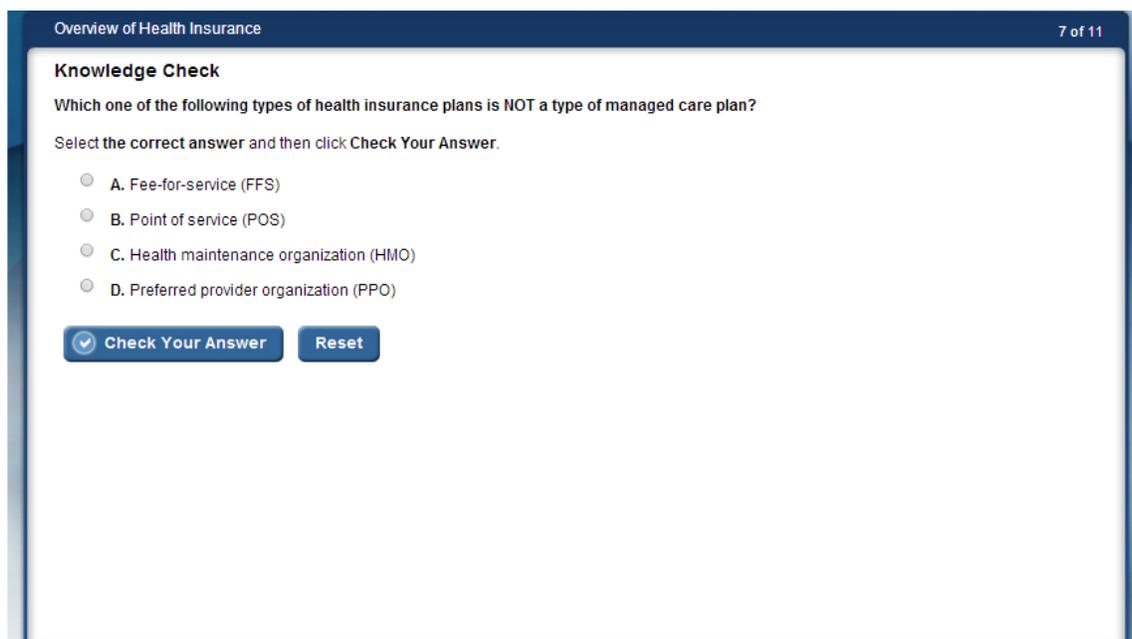
c. Use the toolbox shown in the exhibit below, which is found at the bottom of each slide, to help you as you navigate through each course:

Menu   Help   Glossary   Resources
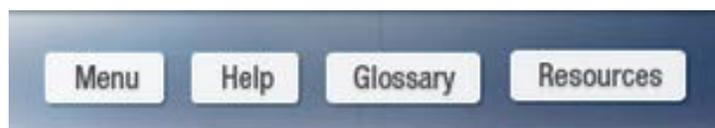
   i.   Click on the Menu button to view a Main Menu that lists all topics in the current course.

   ii.   Click on the Help button to view tips for navigating through the course.

   iii.   Click on the Glossary button for a list of terms and definitions used throughout the course.

   iv.   Click on the Resources button for a list of additional resources for Assisters related to the course material.

Step 6. After you have completed a course, take the course assessment by completing the following steps:

a. Select the hyperlinked title for the course's assessment from the curriculum's list of titles, as shown in the exhibit below:

⊚ **Required Training Due**
This item is a required item, due within the training period listed below.

Assignment Type	
User Group	9/30/2020 11:59:59 PM

Required
Below are required activities for this curriculum that must be completed in the order that is specified.

Order	Title	Type	Status
1	Training Overview	🖥	Completed
2	Health Insurance Basics	🖥	Completed
3	Health Insurance Basics Assessment	🖥	Not Enrolled

b. Next, click the Enroll and Open Item buttons (like you did to begin the course in Steps 3 and 4 above) to begin the assessment.

c. If you successfully complete an assessment, you will see a screen similar to the one shown in the exhibit below.

Health Insurance Basics Assessment   Exit

Final Assessment

Congratulations

Congratulations! You have completed the assessment for the Health Insurance Basics course!

Health Insurance *Marketplace*   Menu   Help   Glossary   Resources   ‹ BACK   NEXT ›

d. **Important:** When exiting an assessment, be sure to use the exit button found in the top right corner of the assessment window, as shown in the exhibit below. Note that if you close the window using your web browser's exit button, your results on the assessment may not register with the MLN website and you may be required to retake the assessment.
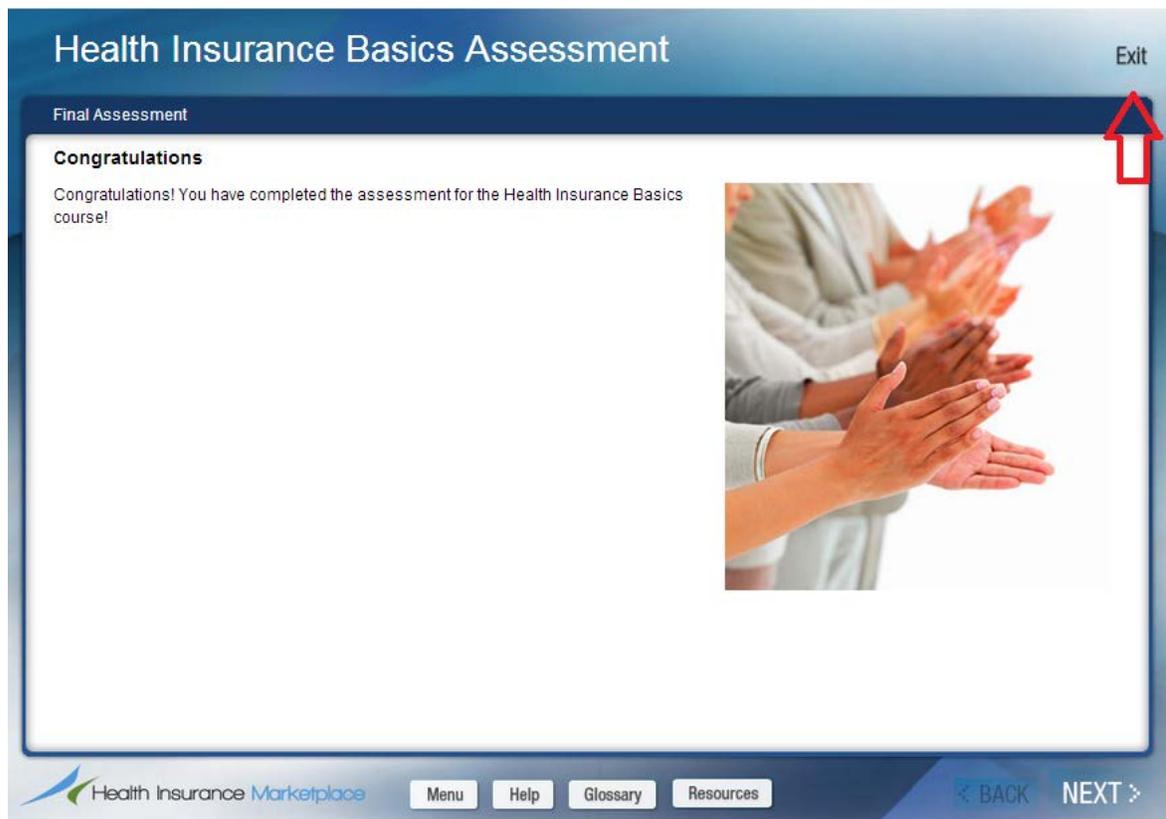
e. After exiting the assessment, click the View Certificate button, as shown in the exhibit below, to view a certificate of completion for that assessment. You will also be able to view a certificate of completion after you complete each course in the curriculum. Print or save a copy of the certificate of completion for each course or assessment you complete for your records. Remember: A certificate of training completion from MLN is not the official document indicating an Assister is certified.

Health Insurance Basics Assessment

You completed this item on 8/21/2014. [View Details]

[Open Current Attempt] [Open New Attempt] [View Certificate]

Description:

Health Insurance Basics Assessment

    f. Note that if you leave before completing an assessment, you will start from the beginning when you return.

Step 7. After completing a course or assessment and saving or printing a copy of the certificate of completion, click the hyperlink for your curriculum, as shown in the exhibit below, to return to a list of the curriculum's courses and assessments:

My Upcoming Learning > Navigator Curriculum

Health Insurance Marketplace

Online

Format: 🖥

Course Provider:

Course Number:

Training Overview

You completed this item on 8/25/2014. [View Details]

[Open Current Attempt] [Open New Attempt] [View Certificate]

Description:

The Training Overview introduces the Marketplace training and certification program (2) what to expect from the courses, exams, job aids, and additional resources; (3) available to each entity; and (5) how to act in the best interest of consumers. There

Step 8. Repeat the steps outlined above until you have completed all courses and assessments.

C. Next Steps

1. For FFM Navigators and in-person assisters: After you successfully complete all required training courses and assessments, CMS will verify the training has been successfully completed and will issue the official certificate that authorizes you to begin providing consumer assistance, provided you have met all additional requirements laid out by

CMS, your state, and your Navigator grantee organization. For FFM CACs: After you successfully complete all required training courses and assessments and have met all other necessary requirements for certification, your organization will issue the official certificate that authorizes you to begin providing consumer assistance.

- The system-generated certificates from MLN confirm completion of training, **not** certification as an Assister. You are not authorized to assist consumers until you have received an official Assister certificate. Note: in addition to the federal training and certification requirements, assisters should be aware that some states have imposed additional requirements. Assisters should reach out to their State Department of Insurance (DOI) to familiarize themselves with their state's requirements. Assisters should comply with state and federal requirements **_prior_** to assisting consumers.

2. Assisters should display their official Assister certificate prominently at their work station(s) and whenever assisting a consumer.

3. Certifications must be renewed annually.

4. For more information about the FFM Assister training, certification, and recertification process for 2014-2015, please review CMS Enrollment Assister Bulletin: 2014-01 "*Guidance Regarding Training, Certification, and Recertification for Navigator Grantees, Certified Application Counselors, and Non-Navigator Assistance Personnel in the Federally-facilitated Marketplaces*": http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/FINAL-Recertification-Bulletin-08-15-2014.pdf.

5. If you are a FFM Navigator or a Federally funded Enrollment Assistance Personnel and you have questions about your certification, please contact your Project Officer or point of contact at CMS. If you are a FFM CAC and have questions about your certification, please contact the designated CAC organization with which you are affiliated.

6. For technical questions related to accessing the training, please email: MLN@cms.hhs.gov.