

**Centers for Medicare & Medicaid Services**  
**Transcript: Assister Technical Assistance Webinar**  
**October 11, 2017**  
**2:00pm ET**

**Contents**

Welcome ..... 2

Enrollment ..... 3

Curriculum Status and Courses ..... 4

Completion..... 5

Content Re-Launch..... 5

Troubleshooting..... 6

Questions and Answers ..... 6

    Unsuccessful Exam Status..... 6

    Correct Exam Answers ..... 7

    Required and Optional Courses ..... 7

    HIOS and MLMS Profile Names..... 7

    Current Learning ..... 7

    Training Options for CACs ..... 8

    Navigator Training Completion Deadline..... 8

    String 22 Error Code..... 8

    Accessing Your Exam Answers ..... 9

    Recertification Expiration ..... 9

    Recovering User IDs ..... 10

    CAC Feedback Module ..... 10

    Printing Your Certificate..... 10

    Profile Resets ..... 11

    CAC Training Requirements ..... 11

Conclusion..... 11

This transcript was current at the time it was published or uploaded onto the web. Policy changes frequently so links to the source documents have been provided within the document for your reference.

This transcript was prepared as a service to the public and is not intended to grant rights or impose obligations. This transcript may contain references or links to statutes, regulations, or other policy materials. The information provided is only intended to be a general summary. It is not intended to take the place of either the written law or regulations. We encourage readers to review the specific statutes, regulations, and other interpretive materials for a full and accurate statement of their contents.

## Welcome

Good afternoon and welcome to today's Assister webinar. My name is Everett Smith with the CMS Consumer Support Group. Before we start today's presentation I would like to go over a few technical details. All lines have been muted so that everyone can have a good learning experience. If you are listening through your computer speakers and have any audio issues, please make sure you use the Chrome or Firefox browser for best audio results. If your slides do not appear to be advancing please try to refresh the webinar. Press the refresh icon that looks like two arrows. It is the third icon in a row near the volume bar. If you continue to have issues try to log out and back in again. Sometimes that helps reset things. If you would like to ask a question during the presentation please do so by typing them in the Ask a Question tab on your screen. Now I will turn the webinar over to Ms. Leslie Wagstaffe. Please go ahead.

Good afternoon and thank you for joining us today. As Everett said I am Leslie Wagstaffe and I am the deputy director of the Division of Consumer Advocacy and Assister Support for the Marketplace. As a reminder, this webinar is intended as technical assistance for assisters. The webinar is not intended for press purposes and is not on the record. If you are a member of the press please email our press office at [press@cms.hhs.gov](mailto:press@cms.hhs.gov) and please note that the information presented in this webinar is informal technical assistance for assisters and is not intended as official CMS guidance.

The purpose of today's call is to help troubleshoot issues that you may encounter when accessing the 2018 Assister certification training. We are joined today by Kaushal Patel and Matt Hoff from our Marketplace Learning Management System team who will provide helpful tips for successfully navigating the MLMS platform and completing the mandatory 2018 assister training curriculum. This presentation will address how to resolve some the most frequently encountered obstacles and will include walk-throughs and steps that can help improve the training process. We will also address frequently asked questions we receive throughout the webinar at the end of the presentation, so please do send your questions through the chat feature. As a reminder you can also submit your questions through the chat feature that I just mentioned. It is on the bottom left of your screen in the box that says "Ask a Question." Now I will turn it over to Kaushal.

Good morning. -- Good afternoon everyone. I hope everyone is doing well. As Leslie mentioned, today's session is primarily set to highlight some key points within the MLMS and the end goal is to provide a more successful end user experience when going through your training. Let me go ahead and get started. We will go over the few bullets that we will be covering today. We will start with the navigator refresher. For you returning navigators we'll go through the process of how you go about adding the refresher curriculum to your training options. We will also touch a little bit on HIOS and the MLMS interactions. From the system configuration slides, we will be going over browser settings and how to

check those settings and where to find information on adjusting your browser configuration and settings. The navigation slides will focus -- we kind of touch on navigation throughout the slides -- In this particular one we look at how to go about finding our curriculum. There are a couple of different paths to do that. Then we will go through the enrollment process and how the curriculum is configured within the MLMS, why they configured that way and what options do you have during the enrollment process. We will go on to the current learning where we can discuss how do you go about finding your courses and finding out which courses are associated to the curriculum you're trying to complete. From there we will go on to the course content. We will discuss some additional options within the training material that you may or may not be aware of and how to make sure that you're completing all of the required elements to get credit for your course. We will also discuss the content relaunch functionality and we'll walk through the path and show you the on-screen settings where you can go to be able to relaunch the content and refresh your knowledge. We will discuss the help desk with some additional recommendations and aid during your interactions when working with helpdesk.

### **Enrollment**

For all of you returning navigators, when you log into the system and you hit the training link you are going to be presented with your profile. Here you are required the first time you log in to click the save and update button. When you do this the MLMS will check with HIOS to confirm you are eligible for the refresher navigator curriculum. If so, once you get into the MLMS you will see that in your training options.

Now I would like to talk about HIOS and the MLMS interaction. There are three things that are compared. We compare the first name and last name that you set up when you set up your portal account, as well as your Navigator ID. Those three elements that you put in in MLMS must match what is in HIOS, even for new navigators. If you are creating a new portal account you want to make sure that whatever name you used in HIOS matches your portal account. You can change either one but they need to match. Hopefully that will help alleviate some of the issues on the initial login.

Let's go into the system navigation. Once you're in the system, you are going to notice the Assister Announcement portlet. I have three bullets highlighted. Bullet one refers to the check your system configuration link. When you click the link you are going to see this lower window here that will open up in either a new tab or a new window and will give you five different settings, everything from JavaScript to pop up. It will give you the recommended settings as well as what your current settings are. These settings you can find additional information on these settings in the QRG which is bullet two. In addition to that, there is an additional source that will give you step-by-step instructions such as how to allow pop-ups in your browser and that is bullet three. To kind of demonstrate, I wanted to give an example using Chrome. You can see that in this screenshot my system was set to block pop-ups. If I go to settings within Chrome I scroll down to the advanced tab. I click that, it will expand, I can search for content settings, I click the right arrow and the page will refresh. You will scroll down and see job descriptions here -- that is one of the settings that the MLMS relies on. You do want that to be allowed. If you go to pop-ups I can click on the right arrow and I can toggle that switch to Allowed. I can close that tab and I can go back into the Announcement portlet. I can re-run that check and it will show that it's not blocked.

You can go to that with the link in bullet three on the prior slide and that will give you step-by-step instructions for both IE and Firefox as well.

When looking at Navigation, I know many of you are familiar with the Training Options portlet where you can click the Actions link and you can go to Begin Enrollment. For some of you who have created multiple assister profiles, you may have more training options than can fit in this little portlet. An alternative is to use the left menu. Click Training Options there and you will have the same Begin Enrollment link and the same actions and enrollment link available to you. One thing to keep in mind is you will see these check boxes on the left side. If at any point you select one of these and you scroll down to the bottom of the page, there is a button there for Bookmark and Ignore. If you ever accidentally ignore one of your trainings or curriculum options you'll still be able to find it. It will be above the search icon where there is a tab that says Ignored. You can go there and move it back into your active recommendations. It would require manual steps from your side to ignore it, but it is possible to move things in that way.

Now that you have found your curriculum let's talk about the enrollment process. The way that all of the curricula are configured in the system is to use a one-click process, meaning when you click the begin enrollment link you will see a screen like this. You will have all of the courses checked and the complete enrollment at the top. You will also notice that it has the courses broken out into Required and Optional. In this case, the CAC curriculum that we are looking at has the six required underneath the Required module and then at the bottom you can see the Optional and it has 12 optional courses listed. It gets cut here but you can see that on your full-screen. One thing to keep in mind is we have the one-click enabled. This does not force you to enroll in all of the courses. You have the option to uncheck the box to the left of the blue icon for each course. You need to keep in mind that for you to acquire the curriculum, you need to complete all of the courses. If you choose to not enroll in the optional ones, that is a choice. You can always come back in and enroll in those or if by chance you accidentally check one of the required courses and do the enrollment, you can go back to the curriculum status, click the curriculum name, and you can see the Complete Enrollment link available where you can click and it will fill in the gaps for you. So it is just an alternative way to look at the enrollment process and to understand what is actually happening on this page.

### **Curriculum Status and Courses**

Now that you've enrolled in your curriculum, how do you know if the course you are taking is associated to the curriculum you are trying to complete? One way is to click that Curriculum Status, click on the Curriculum Name, and that will show you all the courses. But you can also do that from the current learning page as well. By default, this Current Learning page will be set to "All" meaning it will display all of your courses. As you page through, the pages will list all of the curricula that you are actually enrolled in.

An alternative is to click this curriculum link on the right side and what it will do is it will sort the courses by the actual curriculum. Here you will see that when we switched to that, it grouped it by the curriculum I am enrolled in, which is the 2018 CAC curriculum. In this page you will see that I also have a

progress bar similar to what you would see on the curriculum status page that shows me my percentage complete. I also have a line item here displaying the number of required modules and the number of courses that I have actually completed. You have a lot of flexibility on this Current Learning page to be able to see a lot of detail. It is sometimes easier to be able to understand which course you are taking to ensure that you are taking the correct horse for the curriculum you are working on.

I will move on to the actual course now. When I say course we are talking about training material and exams. In the training material this year there is the feature to enable a text mode. What I have taken here is a sample screen shot. On the left side you see this is displaying the default settings which is going to display dynamic content such as images, links, and any sort of question or interactive component for that training material. The training material also can be viewed in text mode only by clicking that toggle next to the exit button. One thing to keep in mind is if you are having issues getting past a particular section or you prefer a text mode only you can go through the content. Completions are counted in the same way if you decide to start in the dynamic and then you decide to switch back to the text, you can go back and forth. Ultimately what counts is that you actually complete the course and go through all the training material. That is an option for you. It is only a part of the training material. Exams are already text only. It is an additional component to keep in mind that is available to you if it works out better.

### **Completion**

So when you have completed your course, what we are talking about when we talk about course roll up or course completion? If you have multiple content items - in this case we have the main training material as well as the exam – the completion status for both items must be successful for this completion at the course level to roll up, so one or two must be successful for three to actually roll up. Now, once you complete that exam, the MLMS shall refresh, when it refreshes the completion at the course level should change. If it does not change, you have two options that you can try. One is to click on the Main tab and then click back to the learning assignment tab, which will cause a manual refresh. The other option is to proceed with your training and wait 24 hours and that should move to completion status. Just make sure that any learning assignment is completed.

### **Content Re-Launch**

Content re-launch is your ability to go in and refresh your knowledge. Say there is a particular course that you're looking to get verification or to find some additional information on that you may have forgotten. So this content relaunch function is available from the Curriculum Status. You will click the curriculum name but this relaunch function is only going to be available once you have completed the curriculum. The completion has to be 100% and the status has to be set to Acquired. Once you have acquired it, if you click on the name you will see that there's a new tab available to you. Clicking on that tab will take you to your courses and you will be able to see the results so when you click on view results you will actually be able to click the launch for any of the training material or exams that you have completed. So again in this example there is only one of the results here. In your case you will see the results for each course you completed.

## Troubleshooting

That leads me to the helpdesk. Like any technology system there are going to be times when you may need to contact the helpdesk and there are certain things during that initial communication, some additional information, if provided, can kind of help facilitate shortening that resolution time. So when you do have an issue, if you can note down the date, the time, the browser check that we displayed earlier, any information from that that shows what browser you are using, your configuration settings and a general description of the error or what was being attempted when you got that error. For example, if you were in the middle of content and you were trying to navigate from a specific page to another page, if you happen to recall an error that displays, those sorts of things are also going to be helpful in troubleshooting. I would like to thank you for your time. Hopefully you found something that was useful. Leslie I will turn it over to you.

## Questions and Answers

Perfect, thank you. We do have some time opened up for Q and A. So if you want to just enter your questions into the chat box we have been addressing them as they have come up, but we can also take some questions live, Matt and Kaushal can.

I do want to clarify one point because we did get a question I saw about whether the presentation is applicable to both navigators and CACs. I think it is related to one of the earlier slides, the navigator refresher slide. This is a step that needs to be taken by both, anyone that is returning to the system. It was called out specifically for navigators because that is how they would get access to the refresher training. I don't know if you want to walk through that part again.

Yes, I'm sorry. Maybe I did not clarify that. With the navigator, because they have a refresher curriculum and we interact with HIOS to confirm that they are eligible for that refresher curriculum, they are required to at least click save on the initial time they log in for this year. Once they click save we have gotten the record from HIOS and given them access to the refresher training and after that they are not required to click save on any subsequent log in unless they make some change to their profile. For CAC's, state IPAs or other Assister types, because there is no refresher you are given the same -- the full training. For those users, if you were a CAC last year you are not required to click save or update your profile unless you have a change that you would like to make to that profile information. Did that make sense? I hope that clarifies.

Yes, that was very helpful thank you. We are getting more questions into the chat feature now so I can turn it over to Matt if you want to start on some of the questions.

## Unsuccessful Exam Status

What should I do if the exam status still shows as unsuccessful even after waiting 24 hours? What we have seen with some people that have not had a successful automatic completion generated is that a lot of times – and I can look at your specific case, person who submitted this question – a lot of times, people try to take the exam only, thinking that that may be enough to complete their course, where you have to complete the course and the exam. Please just double check that you have actually gone

through the actual - what we call - the course narrative piece and the exam, and that you have actually got a passing score for the exam. If both those conditions are met then you should have the system automatically process your completion by the next day. In many cases that's what we have found, that the user may not have gone through the actual course.

### **Correct Exam Answers**

I am going to try to address people specifically as I go through here. When taking the exam, is there anywhere that we could see what we did not get correct. I will have to get back to you on that. I believe there is a way, as Kaushal mentioned in the slides, how you can relaunch the course after you have completed the entire curriculum. You should be able to drill down into the results to see the answers that you may have missed. I will get back to you on that specifically but I believe you have to finish the entire curriculum before you are able to do that.

### **Required and Optional Courses**

If we already did the courses and passed, will it notify us if we need more courses to do as a CAC? It will not notify you that you have more to complete automatically, but the best way, the best thing you can do is on the left-hand side of your screen when you're in the MLMS is click the curriculum status link. Once you click that and you find the curriculum you're most interested in knowing, go ahead and click the title of that curriculum and it will show you all the required courses that you need to take at the top and then at the bottom it shows you the optional courses. Sometimes you might see a View link at the bottom right of your view when you're looking at the curriculum status. You may find some hidden courses where it could not display everything on the page at once. That is the best way to see where you are in your curriculum, is click the Curriculum Status link on the left-hand side of your page.

I would also like to add that if you are a CAC and you are looking to obtain your certification you would also need to check in with your CDO to make sure that you have completed all the training requirements for your particular organization.

### **HIOS and MLMS Profile Names**

Yes. Thank you. I see a question -- HIOS and the MLMS profile names must match, correct. David, if that is your name, the HIOS names must match. If you put in Dave for your name when you signed up for the CMS portal account, but you signed up as David in your organization and your assister organization, you would need to get that change for what you prefer and both to match in both systems. A Dave in a system and a David will not work to get you in as a navigator. CACs, you don't have to worry about that because you do not have an ID number that is validated when you log in.

### **Current Learning**

Matt, just one thing. On a prior question it was about how to check progress of the required courses for the curriculum, correct?

Yes. The learner asked if it would automatically notify them so I directed them to the curriculum status.

Just pointing out the one thing in the slide the current learning will also give you that information and will sort the courses for you and provide access to launch the courses so that is another place that

maybe where you do not have to necessarily go to the curriculum to view what courses are remaining to take and then going to current learning. You can do that also from this page. If you're having difficulty this may be easier for you to find the course that is missing. It will tell you here the number of courses that have left to complete and placed the courses directly underneath that.

That is a super good tip and that is something is showing right now in the current slide that's displaying. In addition to going to the curriculum status, an even better way for some people would be to click current learning in the left column of the navigation. If you look at that red arrow at the top of the slide, you can see there is a Curriculum link you can click. Taking those actions – number one, clicking Current Learning and then number two, switching your view under current learning to a curriculum view will give you a much clearer picture that have to complete yet. Thanks Kaushal for highlighting that.

### **Training Options for CACs**

I do see that some of you have been asking that you do not see the training options when you log in under CAC. Anyone who's asked that question, I'm going to go ahead and after this collect your emails, we have that information. We'll go through and try to correct that for you. I do see some of you with that issue. If you do, please raise it in here. We will look into it and try to figure out what happened. I have a person on my team who has done all of the slides and tests and we show passing but it shows incomplete.

If that person could give us the username I will reply there. I guess I would just recommend that they make sure to go through and be triple sure that they actually went through the entire course narrative. We'll try to help out and look into that if you provide the username. If you hover over the launch button and click History for answers you do not get it looks like somebody out there has found out they can see the answers.

### **Navigator Training Completion Deadline**

Go ahead.

Is the last day to complete the navigator – I can't answer that one.

You can tee it up for me.

Did the last day to complete navigator training change from September 30 to October 31 for recertification? Leslie, I will let you answer that.

I have other folks who are smart on these things in the room with me that will correct me if I am wrong. The actual training completion date did not necessarily change. The direction was provided to the navigator organizations that they should have all of their staff trained. Originally the goal is before October 1 but it's been updated to move it to November 1. There was no deadline so to speak for the individual navigator if that makes sense. That has not changed.

### **String 22 Error Code**

I see another question here after clicking the training under MLMS I received an error code of string 22. When we see this occur, we usually see that the assister role was somehow removed from your portal

account so in those instances I would go ahead and under your – when you log into the CMS portal, in the upper right area under your name, there's a little arrow and if you click that little arrow and then select my access you should verify that you have an assister role associated with your account. Every time I've seen that error, where there is some sort of a string 22 it means that for whatever reason your portal account lost the assister role, so please go ahead and check that you can add that by clicking the Request Access button in portal and then go to the FFM marketplace learning management and re-add the role to your profile. That should take care of that issue.

### **Accessing Your Exam Answers**

We have someone asking how we would they see the answers. Do we have a site for that, to see the answer history? So in order to do that, when you have completed your curriculum, you are going to click the Curriculum Status link on the left-hand side and go to the curriculum in which you locate the line of the curriculum in which you want to see the answers on. To the right, there's an Actions link. You click Actions and there should be a View Course History link that appears. Once you click that you can drill in deeper to view history and view responses by kind of looking for those sorts of links and it will eventually bring you to the answers on your exams. I know it's hard to follow verbally, but once you finish your whole curriculum, click curriculum status on the left when you're in there then clicks the actions link and view the course history associated with that curriculum and you should be able to drill down and find your answers.

Matt, I have the Content Re-launch screen up. It is similar to that click path for those who are following along. The recent course history is the same tab that is used to relaunch but there are more actions underneath. We just don't have it highlighted.

### **Recertification Expiration**

Thanks! I am seeing some questions like "If my recertification doesn't expire until 3/31/18 but I want to go in now before Open Enrollment -- I don't complete the certification until closer to my expiration date is that okay. I am not sure -- I think it is organization specific but I will let Leslie and crew answer some of that.

This question appears to be Assister specific but I will just generally say that the certification that was received prior to the launch of the 2018 training is different than what we are talking about now. So if you completed your training in March of 2018 you still need to go back in and take the 2018 training. Let me back up. If you took the training in March of 2018, that was for the 2017 plan year.

I think what Leslie is trying to say is that if you took the training earlier this year before the new training launched you are going need to go in and take again the new training. Every year we ask navigators to be re-certified and they have to take the current training. If you have a completed certificate for 2017, you will only have to take the Refresher course for 2018.

Thank you, Sarah.

Leslie, this is Deborah. If you don't mind I'd like to clarify this question in case it's coming from a CAC. If you are a CAC you are only required to take the training annually we encourage you to take the new

training so that you can see the updates but you are not required to take the new training until it is time for your recertification so if you are recertified in March there's no requirement that you take the new training now but we do strongly encourage that you take it before the next open enrollment because there are updates included.

Thank you

### **Recovering User IDs**

I see another question. I was able to log on to the portal. I did try to click on the Forget User ID but I keep getting an error message. Do I need to re-register?

You can call either the CMS IT service desk and work with them to try to figure out what your ID is. They would be the best people I believe to help you with that if you're getting an error trying to do it through the system. But again, I'll let people who are more familiar with those processes speak up as well. Sounds like I might have nailed that one. So yes, please call the CMS IT service desk and see if they can help you with your portal account. You shouldn't have to re-register as a new user again.

### **CAC Feedback Module**

Those are all the questions I think I've seen. There are specific ones I will look into. I have a couple that as I mentioned they did not have a CAC training so I will look at that otherwise are there any other questions? Okay let's see.

I have been having issues with the CAC feedback module. I've completed the module and it just doesn't change to completed status. I've logged out several times and repeated the module several times. In that case, I'll have to look into this specifically. However, normally, if it were to happen today we would say check tomorrow, but we will have to take a look closer to see if we can help you. Thanks for submitting that. In general the next day as long as you have completed the exam and the course it should go to Complete, in this case it's a feedback module, so that's a little bit different. So we'll look into that.

That one is just one content so there is nothing from an exam perspective.

### **Printing Your Certificate**

How do you print the certificate? So to do that, what you would do is once you have completed the curriculum, you click the curriculum status link in the left-hand side of the page and find the curriculum listed in your list once click the link. In the right there is the action link when you hover over the action link there is going to be a print certificate option and that is how you should print your certificate of completion once it is complete and the screen that Kaushal displayed is showing clicking on that curriculum status on the left and you can see the blue lettering there under the name is the name of the curriculum, and then on the far right of the screen is the Actions link and that is where you would print the certificate link once you have completed it.

## Profile Resets

I was told if you have not logged in in two months then you have to call to reset. Someone offered that up as they may reset your profile if you don't log in. That is something to keep in mind. I'm going to get you the number of the IT service desk as well, someone asked for that. I'm not sure if you have it handy, Leslie, but otherwise I'll look that up.

I am pulling it down now.

Thanks. Is there any other questions? I do not see any new ones yet.

It is not handy at my fingertips right now but I can get this information out to folks.

We are trying to juggle it.

Somebody actually posted it. Thank you. It is 855-267-1515. Again, the number for the CMS IT service desk which I suggest you call if you actually cannot log into portal and you do not even -- you are not even sure what your username might have been from last year, then call 855-267-1515.

## CAC Training Requirements

I see another question. Correct me if I'm wrong. Did you all say that the returning CAC certificate expires 10/31/17 and you only have to take the refresher course? So, CACs don't have a refresher option so every year you are required to take the full training at this point. I don't know if that will ever change. And about expiration, I cannot speak to that but Leslie and crew, maybe you have something you can offer them.

Also I just wanted to state for the record that if you're not familiar with the term CAC, it is C-A-C. I just want to make sure everybody is on the same page.

For CAC the requirement is for training completion annually but as Deborah mentioned earlier we recommend for folks to come back every year once the training is updated to take the training again so they can have the most up-to-date information from the training.

## Conclusion

It looks like the questions have stopped flowing in. I'll give another minute to see if anybody has any other questions for the MLMS team while we have them on the line.

Thank you everyone for attending and hopefully you got some useful tips from this and we can address some of the specifics.

Okay. We have remained constant with no additional question. Special thanks to our presenters today, Kaushal and Matt, for answering the questions and taking the time to walk through some steps. As Matt just said, hopefully you were able to take away some tidbits to try to help move you guys through the training. Just so you know, we will be posting the slides, so we'll have that up hopefully in the next week or so, so you can come back to this and the transcript as well.

Thank you everyone again in the assister audience for participating in today's webinar and for all of your hard work. Just keep it moving for the assister training and gearing up for OE 5 and have a wonderful rest of the week. We'll see you on Friday. Thanks.

---

[event concluded] This message is intended only for the use of the Addressee and may contain information that is PRIVILEGED and CONFIDENTIAL. If you are not the intended recipient, you are hereby notified that any dissemination of this communication is strictly prohibited. If you have received this communication in error, please erase all copies of the message and its attachments and notify us immediately.