PY2022 FFE Assister Training Transcript

This document is a transcript of the Marketplace Assister Technical Support webinar.

July 2021

Table of Contents

Agenda

Hello everyone, my name is Jabaar Gray, and this is the assister training kickoff for the launch of Plan Year 2022 web-based assister certification training (WBT).

Objectives

Here are the objectives. I'm not going to read all the bullet points in these slides. So, in general, just follow through the bullet points and it will map out where we're going in each particular part of this training.

State Certification and Training Requirements for Navigators

Some states have imposed additional state-specific assister requirements, including additional training requirements. So, the assisters should reach out to their department of insurance, the state's department of insurance or whoever is the regulating entity, and familiarize yourselves with their rules, because they may be different than ours on the federal level.

Here are the state certification and training requirements for assisters. So, on the left you will notice that the federal Navigators and the CACs and other assister groups require eight courses and they must have an 80 percent pass rate. There are four additional optional courses and a feedback assessment that are included in the curriculum. For returning Navigators and returning CACs, certified application counselors, there are seven required courses and the same passage rate of 80 percent. There are five optional courses and the assister feedback assessment that are also included in the curriculum.

At the bottom is a big yellow bar. In general, you do want to pay attention to those bars on each of these slides. They will have important information. This one says what we previously stated—that you must fulfill all training and certification requirements based on their qualifications of the assister group.

Steps to Certification Completion

Okay, and here's where we're going next, which is steps to certification completion. The first one will be how to prepare your computer system.

Prepare Your Computer System

So, when you're preparing your computer system, whether it is your company's or nonprofit's versus your personal computer, please note that some company networks restrict access to certain websites and/or internet browsers. Some company computers have additional security controls or software that may interfere with the MLMS access. If you experience technical issues, complete your training on your personal laptop or computer, which may have less security. And if that doesn't work and you don't have access to a laptop or computer, we suggest you visit your local library.

Steps to Prepare Your System

This is the pre-login. So Javascript needs to be enabled for successful use of the CMS secure portal. This blue hyperlink will pop up a function that will allow you to enable Javascript. The second one is to allow popup windows for your following URL. So, what you want to do is open up your browser and then the different browser types have different specific instructions. Please note we have Microsoft Edge listed instead of Microsoft Internet Explorer as one of the preferred browsers.

Okay. We are now into the post login (portion) of these steps to prepare your system. Once you have logged into the MLMS, verify your computer is ready by selecting the MLMS Check Your System link from the MLMS Assister portal located in the need help section in the Review Assister Certification Training resources under the computer/browser issues, and the red box will show you the hyperlink to that particular PDF to show you how to do this. So, again, at the bottom there's a yellow bar that we should take note of, and it says the login steps are located on slide 29 of this presentation for your future reference.

This is what will pop up after you select on the MLMS Check Your System link. This is the popup. What it will show you is the information as a guide to modify your computer/laptop settings for an ideal training experience. Complete the steps before submitting a help desk ticket. If you still have technical issues, contact the help desk and provide a screen shot of your system results for faster assistance. So, you'll want to take a screen shot of this and share that when reaching out to the help desk. And they will have the ability to help you quicker instead of trial and error if you are having issues.

Register for CMS Secure Portal ID

Okay. Now we are moving onto the Register for CMS Secure Portal ID section.

Steps to Register for CMS Secure Portal ID

Here are the steps, and we'll essentially go through each of these through this presentation. Complete these steps if you do not have a CMS secure portal account and/or have never logged into the MLMS. So this is if you are brand new. If you are returning, then that's a different process. So, we're going to go through the training as if you were a brand-new assister, and the steps you will need to take, and then we'll follow it with returning assister types and the steps you would need to take.

Step 1: Select New User Registration Link

So, you’re a brand-new assister taking the WBT or assister WBT training for the first time. What will happen is, you'll go to the CMS secure portal, and this is the page that will pop up, and you will select that blue box at the bottom for New User Registration link to create an account.

Step 2: Select MLMS Application

(No audio)

Step 3: Agree to Terms and Conditions

Once there, in step number one, it will ask you to select your application. Select Federally-facilitated Marketplace, then select Request for MLMS training access. That will populate from the scroll down.

The next step is to select your application and then check the box to agree to the terms and select Next. Typing FFM in the Select Your Application field will highlight Federally-facilitated request access but much quicker. So, instead of typing out the whole Federally-facilitated Marketplace, you could just put in FFM in step number one and that should populate what you need.

Step 4: Register Your Information

Now we’re going to show you the screen for registering your information. This is pretty standard. Fill out the empty fields and select Next. Complete each register your information required field as indicated.

Step 5: Create Unique ID and Password

(No audio)

Step 6: Answer Challenge Questions

You will create a unique ID and passwords and answer your challenge questions in case you forget your password. Try to remember to ask yourself questions that you’re going to remember the answers to, and make sure the answers are going to stay consistent over the years. Instead of favorite friend or favorite pet, maybe go for the questions like first cousin or first car because that won't change. If you forget your user ID or password, you will need to know the answer to the challenge questions. Again, make sure you choose questions you're going to remember, or write them down and save them.

Step 7: Review Registration Summary

All right. Now you need to review your registration summary. After verifying your information, the confirmation page will open. Select the green user link to log into the CMS secure portal and submit it.

Request Access to MLMS Training

Now we’re going to show you how to request access to MLMS training.

Step 1: Login to CMS Portal

So, you have created a user ID and password for your CMS portal. You're probably going to wait a couple minutes because it's going to send it to this database, it's going to collect it and then secure it. When you come back, it will then have the appropriate information that you can verify against. You don't want to do it too quickly because it might not be there in a timely fashion. Once you put in your ID and password, you agree to the terms and conditions, which we always do, and select Login.

Step 2: Select Training Access Role

You will notice this "My portal" portlet, and up top it will ask you well which portal access do you want? There are multiple ones in the CMS secure portal but we want the FFM training, so we’re going to select the Add Application button at the top, the blue one, and then we're going to select Assister for the application type, after you put in the FFM. That should be prepopulated already, but make sure you select Assister here in the dropdown menu, and then select Next.

Step 3: Search for FFM/Request Access

This is a slightly different step than in the previous years. The user interface for the CMS portal has slightly changed, for all the different applications using it. So, you will notice that you have a couple different steps than in years past. They're pretty intuitive, but they are slightly different. When you need to request your application access, you’ll notice at the bottom of the page, the box is asking you to write "Access Assister Training." Basically, they want to know what you're doing in this portal and what are you requesting. So you’ll submit that.

Step 4: Complete Identity Verification

And then we will need to complete the ID verification. Select the launch box at the top and select the green Next button for identity verification overview. Next, we will select the terms and conditions, which we always do, and select Next. And then we'll select Next again. Please note that your social security number in step three is optional. That is required for some other portal applications, but not for ours.

Access MLMS

All right. Now we are going to access the MLMS site that sits behind the CMS secure portal. So, they are two different systems linked to the other. You have to come into the CMS portal to get to the MLMS training site.

Steps to Access MLMS

This assumes that you have completed the portal access and you have your ID and password and everything is hunky-dory, and then it will ask you to come back to the CMS portal once all your information and your ID has been verified and you have logged out. You come back, this is your first time going to the MLMS portal, so it will ask you to go to the CMS portal and then select the MLMS Training tile. Then it will ask you to complete your MLMS assister profile page. So this is the information that we, in CCIIO, are collecting from the MLMS assister profile page. If you are a new assister, complete the required fields and select Save and Update. If you are a returning assister, it should be pre-populated for you. So, review it and then edit it if necessary, and select Next. And now we will go to the assister landing page.

Step 1: Login to CMS Portal

Here are visuals showing you how to get there. Again, this is the first step. You're back at the CMS login portal. So, an important note, at the bottom here, if you have forgotten your user ID or password, select the appropriate link below. It will help you reach to the appropriate help desk. There are different help desks that help different systems. That's why I didn't have that spelled out for you.

Step 2: Select MLMS Training Tile

Once there, you will select under the My Portal your one and only probable tile, which is the MLMS training tile. You select that.

Step 3: Complete MLMS Assister Profile Page

All right. Step three is to complete MLMS assister profile page. So, it assumes you got through the portal fine, you jump to the MLMS assister profile page, and we have specific information we are trying to collect. All individual Navigators should ensure they registered for and complete the 2022 Navigator training, and they must use their unique Navigator ID assigned by the CMS Navigator grantee organization you are affiliated with. So, your organization will assign you a number. We do not. Use the unique Navigator ID number to ensure that the Navigator certificate is issued reflects the current ID number, and the current affiliation with a CMS Navigator grantee organization, in case you move from place to place but keep the same job.

All right! Step three, complete MLMS assister profile page. You are a brand-new Navigator, we’re going to show you the steps, the screen shots, what that would look like. You're here at the assister profile page, the first scroll down is the assister type. There you would put FFE Navigator. You will have your different assister type choices in the dropdown there, so make sure you pick the right one. If you are a Navigator, then it will ask what kind of organization you have, and then it will ask you what your Navigator ID is at the bottom there. It must be completed or else it will not grant you access. So complete all that and save or update in the bottom right.

If you are a returning Navigator, down there at the bottom, it looks the same, essentially, but you will have your ID there. Why that's important is because if you use your Navigator ID correctly from year to year, you wouldn't have to take the full curriculum in subsequent years because we will have it stored in our database that you have, in fact, completed a previous year's training. So, complete the required fields and select Save/Update. Returning Navigator accounts will be validated upon login. If the system is unable to certify the account, you will be prompted to contact the appropriate help desk.

Now we're going to show the certified application counselor types, how they would walk through. And please note at the bottom there, it says starting in plan year 2022, CACs will be issued a unique CAC ID to be used when setting up a profile. So, the CAC IDs will be similar to the Navigators. In years past, you didn't have to have your CAC ID in there to advance to the training, but you will want to make sure you are doing that just like the Navigators so that you won't have to take the full training in subsequent years. Okay. But notice instead of putting in the FFM Navigator in the first box, you would put in certified application counselor and the type of organization you belong to and your ID. And then save or update.

This is another assister type. This is the State Based Exchange who use the Federal Platform (SBE-FP), so essentially these are states that have their own exchange and regulate their own exchanges, but their assister organizations use this, the MLMS platform, to take their trainings. So just like the previous two different groups, you would scroll down there to select SBE-FP or State Based Exchange—Federal Platform, and then you would fill in the subsequent information. Your organization will probably have an ID that you would put in there, but it won't be validated against our system. And, finally, you would save and update.

Step 4: Access MLMS Assister Portlet Landing Page

Step four, access MLMS assister portlet landing page. So, once you get into, once you've gotten to the profile page and it sends you to the training, here you are at the MLMS assister portlet landing page. You will arrive at the assister portlet landing page after the previous steps. To return to this page at any time, select Home on the left navigation bar. So, once you get in there, if you don't like the different places you're navigating to and you just want to go back to the beginning, just go to the Home button on your portlet.

Enroll in Curriculum

Okay. We're going to show you how to enroll into a curriculum.

Steps to Enroll in Curriculum

Steps to enroll in a curriculum, the first one is to select the training options to begin enrollment. Then you need to complete it and go to the curriculum details and launch it. We'll show you how to do that.

Step 1: Select Actions and then Enroll

So, you're at the portal and you want to select the bottom button there, training options, under the little silhouette. And then you—once you have your different options come up, you will have an action over there, next to whichever curriculum you choose, you will select that and then it will ask you if you want to begin enrollment. So to view required curriculum, go to the training options page, select Actions next to the course name and began enrollment. You'll have different curriculums you can choose from.

Step 2: Select Complete Enrollment

The curriculum is displayed under register for CAC curriculum plan year, well this would be 2022, and we're showing you as if you are a CAC. Select the required modules that will be prepopulated by filling in those blue boxes under the required. Notice some modules include both a course and an assessment, and you want to complete and select both and complete enrollment.

Step 3: Select Go to Curriculum Status

Now, to begin a course, after you have chosen a curriculum, you would go to the curriculum status under the silhouette on the left-hand side, but above the training options that you just chose, and select Curriculum Status. It will show you which curriculum you are enrolled into. So you go all the way to the right next to it, and the blue hyperlink, you open that up and it will show you the curriculum courses and you select that.

Step 4: Select a Course

So, the first course will pop up. You select the course name and select go to Launch, that blue box there. You select that and it will bring you to this page where you will launch into the course. So, to begin a course or assessment, go to Launch under the course name. A new window opens on top of the page displaying the training course or assessment, which you'll want to select.

Complete Required Training

The next step is to complete all the required training.

Steps to Complete Required Training

Here are the steps to complete the required training. So, in general, you'll want to select Next to advance through the training and select all the different links in the page. Select Exit when finished.

If you need to exit before completing the course, your location is bookmarked and you can return to this spot when you return to the course. In other words, if you select the X at the top of the page that is unique to the MLMS training, that will close out the training and it will be bookmarked. Now, if you close the browser, whichever browser you're using, then it will not shoot anything to our database and it won't be bookmarked where you finished.

So, step four is you want to take a screen shot of course completions. If you've gone ahead and taken a whole course and it says you completed it, take a screen shot in case it does not register correctly, and you can share that with the help desk.

Step 1: Select Next to Advance Training

So this is, say, the first training page, and this is showing you the format and the layout of the pages. So on the training course window, use the Next button at the bottom right there to advance through the training and the Back button to go back. They should be right next to each other. Don't use the browser buttons or the browser advance and return.

Step 2: Select All Links

Notice these blue hyperlinks. You will need to select on every single one of those to be able to advance to the next button, to the next page, and do the knowledge checks. That way you don't just select Next for the entire thing and just guess at the assessments, like some would like to do.

Step 3: Select Exit

All right. So this is showing you in graphic form what I was talking about earlier, which is the Exit button has been highlighted. That's how you want to leave when you've completed a course, or if you need to just leave but you want it to be bookmarked. During the course, the Exit button can be used to bookmark your place. Once the course is completed, the Exit button is used to leave the course.

Step 4: Take Screen Shot of Course Completion page

And, like before, take a screen shot of your course completion page and this shows you how to do that for Windows or Mac.

Step 5: Review Completion Status

So if you want a different layout status or detailed status view, the complete progress report has a detailed status review button. You would select that, and you would have different options. So this is a graphical option, how they're lined up next to each other. Some prefer that. Others prefer one that goes from top to bottom. That's essentially what you have a choice of.

Print Certificate

Now we're going to show you the steps to print your certificate.

Print Certificate

And these are the steps we’re going to go through.

Step 1: Select Curriculum Status

(No audio)

Step 2: Select Actions and Print Certificate

Under Curriculum Status, under the silhouette on the left-hand side but above Training Options, you would select that, and then it would show hopefully your completed course and your previous years' courses, too, if you have done that. But you want to now print the certificate, scroll over to the Actions buttons on the right and it will give you different options. It will show you to View Your Certificate and Print Certificate. You want to select Print Certificate. And your certificate will be populated. This is what the Navigator one looks like. This is the CAC one. And this is the State Based Exchange using the Federal

Platform. Or the Other group, kind of a catchall for people who don't necessarily belong to the other three but still want to take this training.

Relaunch Completed Course

Okay. You've done everything, you've got your certificate, and you say to yourself, I would like to take a particular course again. It had some information I was digesting, but I think I might need to revisit it. Because when I was helping a consumer, they asked me a question that I didn't necessarily have the answer to, but I thought I had been trained on it. So, you come back to the MLMS portal from the CMS portal like normal. You are now a veteran of doing this.

Steps to Relaunch Completed Course

And we want to show you how to launch a completed course. These are the steps.

Step 1: Select Curriculum Status and Curriculum Name

You're at the profile, go to the curriculum status under the silhouette. You will view the completed courses over here, so you—or whichever curriculum it is, from this year or whatever. You want to select a curriculum name.

Step 2: Select Recent Course History and View

And then you will have the option to select Recent Course History, that green block right there in that bar. So you can select recent course history to locate the course and then select the View Results, that blue button to the right.

Step 3: Select Launch

Once you select that blue button to the right, which will be the particular course, you can have the option to then launch it again by selecting the Launch button.

Step 4: Course Opens

And this is what it would look like once it opens. The training content window will appear and the course opens.

Assister Feedback

Finally, assister feedback. Once you've completed the course, you've got your certificate, we typically ask some questions to get your feedback.

Steps to Complete Assister Feedback

And these are the steps to begin that process.

Step 1: Select Launch and Begin Survey

To start a survey response, you must select the course name, and then select the Launch button to the right of it.

Step 2: Select Completed Curriculum

Select what assister type you are and select submit. The assister survey is launched to allow course feedback. And then you'll be asked a series of questions, and you would populate it with your honest assessment. Pretty self explanatory. You can select Skip to go over any questions you don't want to answer or that are not applicable to you. You cannot go back after you skip a question. You must select Submit on the last question page to ensure your answers are saved in the MLMS. The Submit button there.

Troubleshooting

All right. We're going to go over a few troubleshooting slides.

Prepare Your Computer System

The first one is to prepare your computer system. So the following are approved browsers, Microsoft Edge, Chrome, and Firefox. If you experience technical issues, we recommend that you clear your browser's cache. And then select the appropriate browser link for instructions on how to clear the cache. So later if you're having trouble, you can go to this training and find your particular browser application and get the instructions for it by selecting the blue hyperlinks at the bottom to the particular browsers.

Access MLMS

Alright, access MLMS troubleshooting. If you are not automatically brought to the MLMS landing page after selecting the Save/Update button, select the Next button on the re-direct screen.

Complete Required Training

Complete required training. So this issue is dealing with portal timeout. CMS secure portal times out every 30 minutes. If you get up and you leave and you come back, you may not notice, but the CMS portal will have timed out your training, but that doesn't necessarily tell our system, the MLMS system, that they have done that. You want to select the portal window every 28 minutes and look for a popup box to continue the current session.

What we really mean by that is, you will have your MLMS training, browser, but you will also be still logged into the CMS portal browser as well. You'll basically have two tabs. What we're saying is every 28 minutes or so, make sure you go over to the CMS secure portal and just basically run your mouse over the page anywhere, just select it somewhere so it has a hit and it shows that you are still active. Don't get distracted and go longer than the 28 minutes and get at the end of the course and find out it didn't, in fact, save your information. Now, if your session does time out, you may need to clear your cache or log back in twice in order to view the MLMS training link on your CMS secure portal page.

Complete Optional Training

This will show you how to take optional training, if you so choose. To enroll in another curriculum that contains the optional course, perform the following steps. So you go to CMS portal, you go to the MLMS profile page. You would need to change something for you to get a different curriculum type. So you would change either the assister type, organization type, or Navigator ID or CAC ID, if that's required. And save and update that, and then select training options once you get to the portal. And then enroll in the desired curriculum using the actions link that we showed you in the previous slide. The optional courses you did not take as part of your previous curriculum will now appear in curriculum status.

Resources

Here are a few resources if you need more troubleshooting help. There are two different help desks. There's the MLMS help desk that answers questions that are pertinent to just the MLMS. Now, if you have a CMS portal issue that is separate from ours, there is a different email address, and over there they will help you with your user ID and password issues. They don't have any access to the actual MLMS. So there's two different systems, so it's good to know which you need help with. So, on the left side you see that the MLMS help desk can't help you print your certificate, but it can help you if you can't find the curriculum or if your training is not launching.

In general, the yellow bar at the bottom, these are the things that you will help yourself and help the help desk if you collect this before you even reach out to them. A screen shot of a check your system configuration page. Screen shots of whatever issues you're having. Third-party security software, if that's installed. And if Flash is installed.

We have QRGs, which are quick reference guides, and they are available on the CMS training for Navigators, agents, brokers, and other assisters at the website, at the Marketplace.cms.gov technical assistance. And the hyperlinks are available there.

There are frequently asked questions, FAQs, pertaining to Navigators, agents, or brokers and others, and there is the MLMS landing page help, the popup help desk window, and other FAQs that you can use.

Okay. And that concludes the Plan Year 2022 assister web-based training webinar. Thank you. And have a happy and successful Open Enrollment.