

Transcript

Annual Plan Year 2023 FFM Assister Certification Training
2022 Customer Support Group Marketplace Assister Webinar Series
August 31, 2022



ARDX Facilitator: Liz Willis

CMS Presenters: Melissa MacLean

Welcome to the Consumer Support Group Assisters webinar series training. Today CMS will host the Launch of Plan Year 2023 FFM Assister Certification Training. Our speaker today is Melissa MacLean with CMS. Please note that the information presented in this call is informal technical assistance for Assisters and is not intended as official CMS guidance.

We would like to advise attendees that there is live closed captioning available. To turn on your closed captioning, please click the close caption icon on your webinar screen and select show subtitle. Now, to begin today's training presentation, I will pass the virtual microphone over to Melissa MacLean, Melissa.

Thanks, Liz. And welcome everyone. This is our Annual Plan Year 2023 FFM Assister Certification Training. I'm going to walk you through the training this year. And hopefully that will help everybody out and you can have a good experience on the MLMS system. Next slide.

So, for our agenda, we're going to go over some objectives, the state certification training requirements in FFM states, the state certification requirements for FFM Assisters, what's new in the MLMS, steps to certification completion, a demonstration and Help Desk support resources. Next slide.

Objectives at the end of this webinar, you should be able to understand the training, the certification, recertification, you'll be able to prepare your computers so you can take the training, identify the steps to create a CMS portal ID and login, create and request access to the MLM, enroll for required curriculum, complete your training, print a training completion certificates and if necessary, re launch a course complete survey feedback and locate additional resources. Next slide please.

So, state certification and training requirements in FFM states. Some states have imposed additional state specific Assister requirements including additional training requirements, Assisters should always reach out to their state's Department of Insurance or DOI or other regular regulating entity to familiarize themselves with their state's requirements. Next slide please.

For FFM Navigators, CACs, SBE-FP Assisters, which are State Based Exchange using the federal platform Assisters and others, if you are new, you need to take their required eight courses and corresponding assessments or tests and you need to pass that with an 80% pass rate. There are

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an optional four courses that are included in the curriculum. For returning Navigators and CAC's. There are required seven courses that you do need to pass with the 80% pass rate and there are optional five courses included in the curriculum. Just wanted to call out a note here if you did not manage to complete your training last year so for the plan year 2022 training, you will be required to take the full Assister training. Assisters also must fulfill all training and certification requirements prior to the start of Open Enrollment on November 1, 2022. Next slide.

What is new in the MLMS? We have exciting news this year. MLMS is now going to be using a new hosting platform called Cornerstone on Demand to deliver your training. The learning content or curriculum and exams are going to be grouped together as one course. And you will have the ability to evaluate the learning content in an optional survey after you complete your annual Assister Certification training. This screenshot here is the landing page for the new Cornerstone on Demand where your training will be housed. Next slide please.

Okay, so let's get ready and prepare our computer system. Next slide please.

So, if you're using your company's computer at work some you need to be aware 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 taking this training. So, if you experienced technical issues, please to complete your training, you can check with your IT department and see if they can help you access this training. And if that doesn't work, go ahead and try it on your personal laptop, or computer. And if you don't have access to a personal laptop or computer, we suggest that you visit your local library. Next slide.

So, steps to prepare your computer system, you are going to want to allow pop-up windows. And here on this slide, you can see that the additional we have steps in here for Firefox, Google Chrome and Microsoft EDGE. Those are the three internet providers or browsers that we recommend using. Next slide, please.

We should be on slide 10. Okay, so for this one steps to certification completion. So now we're going to get into the nitty gritty. And we're going to learn how you would register for your CMS Portal ID. Next slide, please.

These following steps are for new users. This is how you're going to register for your portal ID. These are just the steps laid out we are going to; we're going to walk through each one of these steps individually. So, let's go ahead and get started. Next slide please.

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First, you're going to navigate to portal.cms.gov. And you're going to select the New User Registration link. As you can see, it is the button below the login in blue. And you're going to want to create an account. So, this is incredibly important to know, this is how you set up an account if you've never logged into the portal before. And if you've never taken the MLMS training, these would be the steps that you follow. If you have taken this training in the past and are maybe with a different organization this year, or maybe you're serving in a different capacity, maybe you were a CAC last year, and this year you're going to be a Navigator, then you do not want to create a new account, you just simply would log in to your existing account. And I can teach you how to update later on. But this is very important. You don't want to have two accounts out there. Multiple accounts do many bad things to mess up your certification, training completions, and all of that it just gets very jumbled and confusing. So again, this is just for if you've never accessed the system before, create a new account and do a new registration. If you have, you will simply log in. Next slide.

Okay, so once you log in your or once you collect, hit Create registration, it's then going to prompt you to select your application. So there's a little drop-down arrow. And if you type FFM into the search box on this page, it's going to pop up with a Federally facilitated Marketplace, FFM request for MLMS training access, you're going to select that. And then you're going to read over the terms and conditions. You're going to check the blue box that says you agree to the terms and conditions. And then you're going to press Next. Next slide please.

Okay, again, for new account users only you're going to register your information. This is asking for your personal information. So, you're going to complete all of these fields. You have to make sure you're entering your home address. You will not be able to pass validation if you put in your work address. That's very important. I know you're using this for work so why should you use your personal but unfortunately you have to use your personal information. Go ahead and complete all of these fields. For your email address, it can either be your work or your home email. And then you're going to click Next. Next slide please.

On this page, we're going to be setting up your unique ID and password and selecting challenge questions. It's I think it might just be one question this year. But anyhow, this is your CMS portal login information. So it does not need to be your email address for your current employer, it could be just whatever you want there. My Login is a version of my name with some numbers after it. So you're going to create your user ID, you're going to enter a password and confirm your password. And then you're going to select a security question and provide the answer and select Next. In the future, when you're logging in, if you forget your user ID or password, you

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will need to know the answer to the security questions. So please write down this information or store it in your phone and keep that safe. Okay, next slide.

So now, it's just going to ask you to review everything that you've entered so far, you're going to review your registration summary, correct any errors if necessary. And then you're going to click Submit User, the green button at the bottom, it's going to pop up with a confirmation. And then in the very teeny, tiny little blueprint there, it says log in. So after verifying your information, this page is going to open and then you're going to click that login blue button to access the portal. Next slide please.

This is also new this year, it's going to ask you to set up multi-factor authentication or MFA. This is an added security measure that we've taken, and you should be used to this from many other websites use this. So you're going to have to do this every time you log into the portal. So you want to on the first step, you're going to select a device or method from the drop down. This would be something that you need to select a device that you have access to regularly. Personally for me, I find it's the fastest and easiest just to use my cell phone. So I always choose text or mobile device. Then you're going to click Send MFA Code. And the code will come to whatever device or email address you have just selected, you're going to enter the code and click Add Device. Now next slide, please.

Okay, so now we've completed setting up our portal account and going through the MFA. We are now ready to request access to the MLMS. Next slide, please.

Again, we've already logged in, and we're going to request the app, select the training and select an Assister role. Next slide, please.

So once you've gone through the MFA, it's going to take you back to the login to the CMS portal. So now you're going to enter your newly created User ID and password, you're going to again, check the box to agree to our terms and conditions. And you're going to click log in. So you're hitting the green button this time instead of that blue button. Next slide.

Okay, so the app is probably already listed. You can, there is a let's see a tiny blue box that says click here. You want to if it's not listed, you want to click Add application. And then you're going to again, type in the FFM to pull up federally facilitated Marketplace requests for MLMS training access. And then the next thing is asking you to do you're going to select Assister from the drop-down menu and you're going to hit Next for your role selection. So everybody listening to this would select Assister. If it asks you for the reason for your request, you will type access

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Assister training and then you're going to start the identity verification process and click Launch. Okay, next slide, please.

So here we're going to complete the identity verification process. So again, you're going to click Launch, it's going to ask you a bunch of questions, you're going to read these instructions very carefully and click Next and enter all of the required personal, again, personal information on the next page. Next slide, please.

Okay, so again, you need to read the terms and conditions and agree, check the box, click Next, put in your personal information. And then you're going to click Next. The reason that it requires the personal information is because this is verifying you out in the world, against your Experian Credit Report. One of the things in this terms and conditions and there's a tip box that comes up and it says that we strongly recommend that you download a copy, a free copy of your Experian Credit Report prior to completing this identity verification step. So that you see what Experian has on file for you. Sometimes they have an older address for you that maybe you've recently moved, but they haven't caught up yet. So they still have your old address. So if you follow the directions on the screen, you can download a copy of your Experian Credit Report for free. Check the information, you're going to want to use your legal name. Again, my name is Melissa. However, I'm known it I'm known by my nickname, which is Missy. But if I were to put Missy in here instead of Melissa, I would not be verified because it doesn't match, it doesn't realize that that's a nickname. So if your name is James, you wouldn't want to put in Jim. Again, you need to use your legal information that would be found on your credit report. So again, you're putting in all that personal information, verify it for accuracy, and then click Next. Okay, next slide, please.

Okay, so, again, we can go to the next slide. Now we're going to try to access the MLMS. So you've done all of these things, you've logged into the portal, you've selected the training tile, you've reviewed the information. And now we should be coming. Once you've passed identity verification, you should be able to access the MLMS welcome page. So next slide.

Once you have gone through the ID verification, it should if you pass, it should let you log back into the portal. So again, you're going to enter that user ID and password you created. Click the box to agree to Terms and Conditions and log in. Next slide.

Then the timer MLMS training tile should appear. So after logging in, you're going to see that box that's over there on the left. And you're going to click on the box and then you'll get that black pop up and then you're going to click on that link that says MLMS training. Once you click

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on MLMS training, you're going to be taken to the Welcome page. That is over here on the right. Welcome to the Marketplace Learning Management System MLMS. And there's a whole bunch of information about your CAC ID and your Navigator ID and then you see some boxes down there you have four options CAC, Navigator, SBE-FP, or other. So this is very important. If you're taking this training and you are a CAC or a Navigator, you need to select C check the box for which Assister type you are and then you need to enter your CAC, or your Navigator ID into the corresponding box to the right.

If you receive an error message that your ID is invalid nine times out of ten that is because you are not listed with your organization on their official roster. For CACs that roster is housed in the organizational maintenance web form, which is managed by your CAC project director within your organization. If you're a Navigator, that information is housed within the HIOS system. So you have to the first step would be if you get an invalid error message would be to check back with your organization and make sure that you are listed correctly on your CAC official CAC or Navigator roster. If you feel that that is an error, you are listed correctly and you still have the invalid error message, reach out to CAC questions inbox at CACQuestions@cms.hhs.gov. Send us an email, let us know what error you're getting. And that you were attempting to log into the MLMS training and give us your CAC ID number. And then we will be able to direct you and help you resolve that issue. Again, it's very important to select the correct Assister type. If you're a CAC, checkoff CAC, if you're a Navigator, you want to check off Navigator. If you're working in an SBM-FP, you want to check that box, your training options are going to appear for your training based on the selection that you have made here. If again, if you're having issues with it's not accepting your ID, you do not want to then just go and check other and take the training that way because you'll be taking the wrong training, and you will not receive credit for that training. Another thing that is new this year, is we do have folks that are serving in a dual capacity. So some people are both Navigators and CACs. If this, is you, what you would want to do is you would check off both boxes for CAC and Navigator and you would put both of your ID numbers which they will be different numbers, they will not be the same in each of the corresponding boxes. And you will be able to get credit for both types of training by just taking that training one time. Okay, let's move on to the next slide please.

Okay, again, this is just a little bit bigger. So you should enter as I said, your ID number corresponding to your Assister type. Again, if you do get an error that your ID is not valid, please check first with your organization to ensure that you're listed in their system. And secondly, you can email CACQuestions@cms.hhs.gov, and provide your CAC ID and the error you're receiving.

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Okay, now, if you were a returning user, and you had logged into the portal last year, and you had maybe taken the training, and maybe you were a CAC, and you were getting that error message on your ID, and you knew you had the right ID. So to get around it, you just took the training under a different category, let's say you took the training for other, it will remember what you chose last year. So if you're a returning Assister, you want to verify that information that that is actually accurate that if it does have CAC that that CAC ID number is correct. And if you did take a different type of training just so you could get the training done. Because it wouldn't validate you on your correct Assister type you want to make that correction now. So you would uncheck the box for other if you took that and you instead would check your proper Assister type and provide your Assister ID number. Okay, next slide.

So, once you validate your Assister ID number, it will take you to the Welcome page. And this looks very different than it did last year because this is the new system. So this is on Cornerstone on Demand. And this is what the MLMS Assister Welcome page will look like. So if you are in the training and you want to get back to this page at any time, you just are going to select Home on the left navigation bar. So your curriculum type if for whatever you had checked this example is for a CAC should appear here it should be the only option in for training that you take. Once it's completed, you are going to receive your credit, and you'll be able to print out your certificate. So let's go ahead and get into how we enroll in the curriculum. Next slide, please. Okay, next slide.

Okay, so here's how we're going to enroll in the curriculum. So I highlighted in red, you can see the link to enroll. So that is your curriculum type under the training options section, so you would go ahead and click that link. Again, this is going to be the required training type curriculum for what you selected. So if you said you're a CAC, it should say CAC there. If you said you're a Navigator, it should say, Navigator. If you are dually, enrolled, you're going to see both curriculum types, you're going to see a CAC and you're going to see a Navigator, you only need to enroll and take one of those, it's the same training. So if you see two, you just need to complete one of them. And then you will, once you have completed it, it will transfer your credit for completion to the other training type. So if you were a CAC, and this year, you're a Navigator, you would want to go ahead and take the new Navigator training that's listed there and go through all of those modules. And then when you're finished with it, and you're ready to get your certificate, it is going to then credit you for also the CAC training, so you won't have to take the training twice, you will get the credit in the backend. Okay, next slide, please.

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So once you click that link, it's going to take you to this page, and you see that you've selected the Plan Year 2023 new CAC training, it gives you some details some contents. And then you'll see over here, there's a blue button that says Open Curriculum. So you're going to go ahead and open that and click that button. Next slide.

Once it opens, you'll see this, and you will select View Details. And then all of the courses within your CAC curriculum are going to show up there. And then you're just going to go to the first one and you're going to select Launch the content and that is then going to open it into a new window. Next slide please.

Okay, so here are going to be the steps for how to complete the required training. Next slide. To move through the training, once the training launches, you're going to use at the top right hand of your screen the right arrow, that's going to go to the next page for each one of these pages. A tip is if there are links contained within the page, like for your training, if it has little links that go to little subsets of training, you do have to click on all of the links within that page in order to move forward and move on to the next page in your training.

When you are finished with when if let's say you need to leave the training before finishing that course, you can just exit the content window when you need to. And it's going to it's going to need to it will bookmark your place so that you can return to this exact spot when you pick it up again. And then you will review the completion status on the Launch page. And once you have completed that entire course and successfully pass the exam for that module, then it will show completed. Next slide.

So this is a little bit of a visual demonstration here at the top right circled in red, you see the little arrows you can go forward or back. Your training shows up in in the middle of the screen. Again, if you don't open each link within a page, you cannot move forward. You can move forward and back using the arrows and that is how you navigate the training. Next slide.

Again if you want to leave the course, before you have finished the module, you would just click the red X up in the top left. And when you get to the end of the course, you will be able to click the link to start the exam, which is highlighted in red at the bottom of this page, the exams are included in the same module as the learning so you can take that exam immediately. Next slide, please.

Okay, after completing the exam successfully in passing with at least an 80%, you will see on the course Launch page that your status for that course has changed to Complete. And that is

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highlighted here in the red. After you've successfully completed the course, and the status hasn't changed, then try if it hasn't changed, try to refresh your page using the refresh icon at the top of your browser. If that doesn't work, then you want to contact the Help Desk or use the in app [INAUDIBLE] chatbot to start a ticket. So if you're if your course is not, it's not advancing, and it's not showing you as complete. The other thing that you want to do one of our tips of the trade is each year, we seem to have sometimes some experience some users experience issues with the courses not showing them as complete and that you passed your exam. When you get to the that last screen that shows that you have completed the course and you have passed your exam, take a screenshot and save that to your computer. This is just a precaution. So if then you do run into a glitch and it's not letting you advance and it's not recording your progress. You can send those screenshots to the MLMS Help Desk email, which all of these email addresses are going to be at the end of this presentation. But it's right there, the MLMS Help Desk is MLMSHelpDesk@cms.hhs.gov. So you would reach out to them if you're having issues that you can't print your certificate, you can't find your curriculum modules or your training is not launching or it's not advancing, again, to take a screenshot of your completion page. And just save that in case you need it. It's always nice to have then they can fix your issue for you behind the scenes and get you going. Okay, next slide.

All right. Now these are going to be the steps to print your certificate. Next slide. Okay, these are the steps you are going to select your transcript, find the completed curriculum and print next slide.

Okay, so on your welcome page or your dashboard, I guess you would call it, you are going to first select the completed transcripts highlighted here in this red box. So you would click that link. And then it's going to pop up to a new window, you're going to filter down for completed current curriculum. And then finally, you're going to select View Certificate from the drop down. Okay, next slide.

Here is an example of the certificate that you would receive from the MLMS training. This will have your information in it once you have completed all the modules and passed all of the courses. This is what you what your price will be. So you would then take this to show your leadership at your organization. Once you have completed the curriculum and passed everything and you've gotten to this step where it's letting you print your certificate, the MLMS system is going to talk to the other systems, the CAC roster and the HIOS system for Navigators. So it will you don't need to do anything to get your completion recorded on that. And so that all happens behind the scenes. Next slide please.

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Okay, these are steps for if you need to relaunch some of your completed courses. Next slide.

Okay, and this you're going to find the curriculum, you're going to select the course you want to relaunch, register again, request and then open it and then take the course and it's going to be detailed in the next slide.

Okay, so again, you're going to find the curriculum that you want to retake, you're going to follow the same steps and select the completed transcript and select completed. Because you've already taken it, so it would list just completed. Next slide.

And then you're going to click on the curriculum name link. So the link for the actual curriculum, and then you're going to go ahead even though it shows as completed, you're going to select Register. So this is something that you would do if you wanted to review some content for a quick refresher. Okay, and then next slide.

So we should be yep, on step three. Okay. So then you're going to request and then open the curriculum. So again, you just follow these steps, click request, and then select Open the Curriculum, and then you're going to select Launch on the next page to open that course. Another good resource for a quick refresher for training is, we do have two other options for you. And these are located on marketplace.cms.gov. One of which is our micro learning series, where we have very short little five-to-ten-minute sessions on specific situations. So once you go on marketplace.cms.gov, you would look under technical assistance, and you would be able to find those courses there. Those are fantastic. And we also have something that we call the Assister Readiness series. And that is also located on the that page. And that is sort of, it shows you how to get somebody enrolled in the Marketplace and walks you through all of that. So those are two additional resources that you could use before you start enrolling folks. Okay, next slide, please.

So if you are going to retake the courses, then you would be brought back to this page, which is the beginning, and they of course would go ahead and open and then you would walk through all of the pages again and retake the module. Okay, next slide.

Course Evaluation. Next slide. This is new this year. So this is Assister feedback. We are looking for feedback from you all about our curriculum and ways that we can improve. So once you have completed all of the modules, and you've completed the curriculum, you have the option to launch the evaluation, which is a survey. Next slide.

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So if you would like you would go ahead and select the options drop down, click View completion page. And then you would see a pop up that says evaluate this training. And you'll go ahead and click that. So again, this is an opportunity for you to provide your thoughts and opinions to us about how we can possibly improve the training. Next slide.

Your survey is going to pop up and then you will just provide your feedback you will go through answer your questions. And if you need to, you can save it and come back to it at a later at a later time. And then when you're finished, you have the option to submit the final answers. Okay, next slide.

So now, the troubleshooting tips. So again, you're going to first prepare your computer system. Next slide.

So to prepare, you would want to use one of these three Internet browsers, you're going to tell your browser to allow for pop ups so that the courseware can function correctly. You're going to want to make sure that your IT department isn't preventing you from accessing any of these any of these sites. So the web address is portal.cms.gov. And again, you want to the key is to allow the pop ups. Okay, next slide.

Okay, here is troubleshooting for completing the training. Next slide.

The portal times out that is important to know Oh, so the portal is going to timeout every hour basically. So every 60 minutes, you want to click the portal window every 28 minutes and look for a pop up to continue with the current session. So if you're just, you know, if you've gotten called away and you're doing something else, and it's just sitting there, it will timeout. So it's advising to not get distracted while taking training, set a timer on your phone for 20 minutes, so that you can click in there so that your session does not timeout. Because if it does timeout, then you just have to go through all that login again. So you would just need to log in through the system. Next slide.

Okay, so this is about the optional training. Next slide. So as we discussed early on in this webinar, there are required courses, and then there are optional courses. So each of the SR curriculum modules contain optional courses. And if you choose to take the optional courses, you would just simply navigate to the section and launch the course that you so desire, you would follow the same kind of steps that you did to launch the initial training. And those are laid out here. Next slide.

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Okay, resources, very important. Next slide. Here is the holy grail of resources for us. This is all of the Help Desk information that we can give to you and what each one of these Help Desk us does. So the first one, the MLMS Help Desk. This is for when you were in the training, you're working on taking the training and you're having issues, that is when you would reach out to this team at MLMSHelpDesk@cms.hhs.gov. And it gives you some examples of issues that you would have and reasons to reach out to that Help Desk. The next Help Desk is this CMS Enterprise Portal Help Desk. This Help Desk is for account issues. So this is for folks that are having trouble creating their CMS portal account. This is for folks that maybe have multiple accounts. And they need to fix that so that there they can take the correct training. This is also for folks that are having User ID and Password issues. And for folks that maybe need to if they were with one organization in a previous year, and they're with a new organization, and they have a new ID, if you are having trouble updating that information, this is the place to contact so they have their email address, which is CMS_FEPS@cms.hhs.gov. listed here, or they do have a phone number?

Okay, so under that we have Navigators. So Navigators, if you have issues that are not covered by either one of those two Help Desks. Or if you're finding that you cannot get your issue resolved properly, please reach out to your Project Officer. So if you're a Navigator, you should know who your CMS project officer is, send them an email, they will help you get through it. And then for CACs when in doubt if you guys have tried everything else, please reach out to the CAC questions Help Desk. If we don't have the answer, we can tell you how to get the answer. So you would want to email CACQuestions@cms.hhs.gov. If you get an error message within the training, especially if it's about your ID number being not valid, if you have issues that cannot be resolved by the other Help Desk. Or if you just don't know just reach out to us and we can at the very least point you in the right direction but most times we can resolve your issue.

Now for identity verification, when you are going through that piece that is identifying you based off of your Experian Credit Report. If you have say put in your work information, instead of your home address, if you cannot pass the identity verification, it is not going to let you into the training. If you have provided that your correct personal information, and it will not and cannot identify you, you're going to need to request a manual identity verification. And you're going to have to provide you a copy of your driver's license and send it in via email to this email address here which is FFMproducer-AssisterHelpDesk@cms.hhs.gov Always for any of these Help Desk, please include the following information a screenshot if possible, of the issue you're having. For the technical assistance with the portal and the Help Desk, it's helpful to provide the

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third-party security software installed if applicable, if you're having firewall issues or something like that, for CACs and Navigators, please provide your CAC and or Navigator ID number. That is very helpful. Okay, next slide.

Okay, this is our resources. We have many quick reference guides available. They are available at this link marketplace.cms.gov. They're listed under CMS training for Navigators, agents, brokers and other Assisters. So you would want to hit that center blue button there that says technical assistance resources, and then it's going to pop up for the screen here that you see training for Navigators, agents, brokers and other Assisters. Here you're going to find a copy of this presentation, you're going to find quick reference guides for how to get through the systems, you're going to find a pop-up guidance, you're going to find computer configuration requirements. You're also going to find the Assister readiness series that I spoke of earlier and the micro learning information that I also spoke of earlier, which are also good resources. So with that, I am going to conclude this webinar. I wanted to thank you for taking the time to watch this today and good luck with your training.

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