



# Launch of Plan Year 2021 FFE Web Based Assister Certification Training

## *PY 2021 FFE Web Based Assister Training*

*Centers for Medicare & Medicaid Services (CMS)*

*Center for Consumer Information & Insurance Oversight (CCIIO)*



# Agenda

- Objectives
- State Certification and Training Requirements in FFE States
- State Certification Requirements for FFE Assisters
- What's New in MLMS?
- Steps to Certification Completion
- Demonstration of Processes
- Help Desk Support Resources



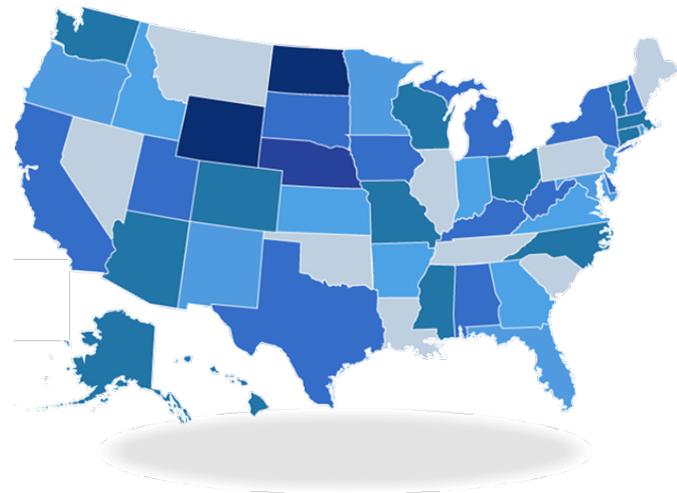
# Objectives

- At the end of this webinar you should be able to:
  - Understand training, certification, and the recertification process
  - Prepare your computer system
  - Identify steps to create CMS secure Portal ID/login
  - Login to CMS and request access to MLMS
  - Enroll for required curriculum
  - Complete training
  - Print a training completion certificate
  - Relaunch courses
  - Complete feedback
  - Locate Additional Resources



# State Certification and Training Requirements in FFE States

- Some states have imposed additional state-specific assister requirements, including additional training requirements.
- Assisters should reach out to their state's Department of Insurance (DOI) (or other regulating entity) to familiarize themselves with their state's requirements.



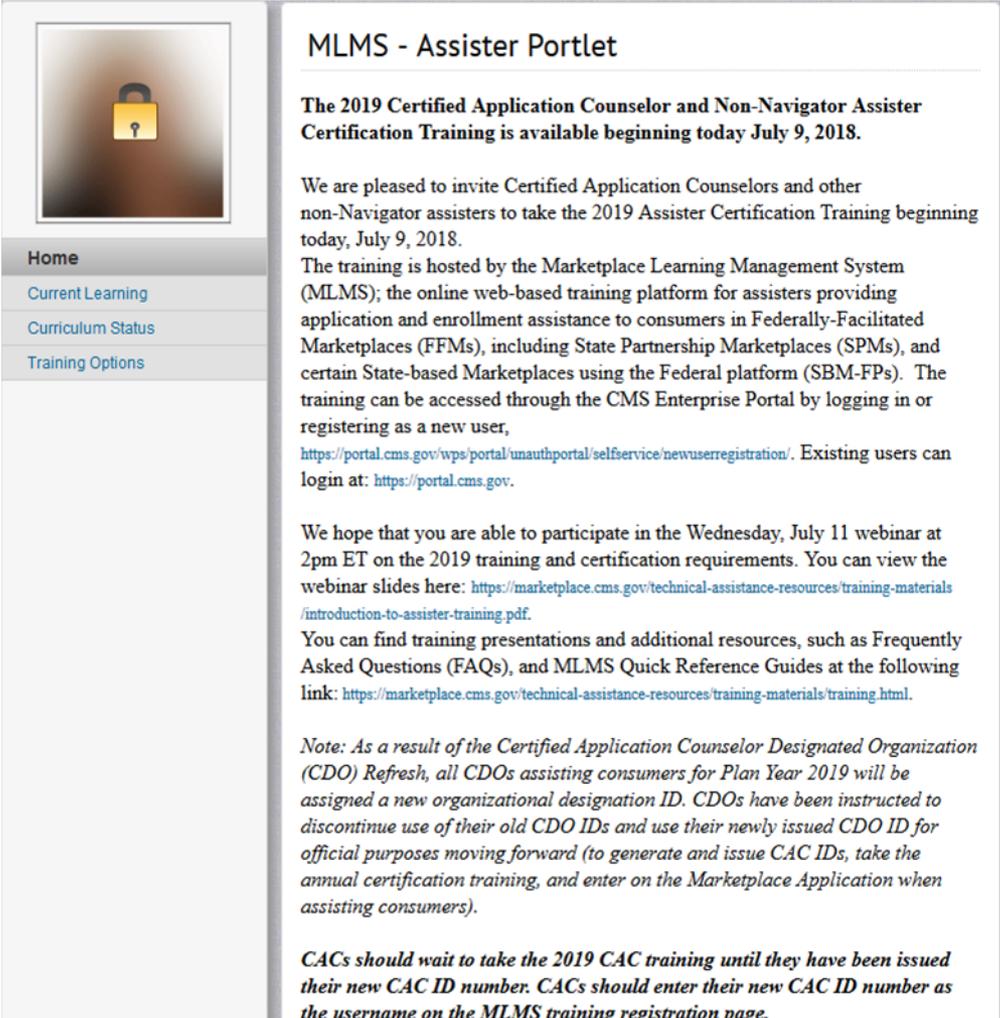
# State Certification and Training Requirements for Assisters

- **FFE Navigators, FFE CACs & SBE-FP Assister:**
  - **Required: 8** courses and corresponding assessments with an **80% pass rate**.
  - **Optional: 4** optional courses and an assister feedback assessment are included in the curriculum.
- **Returning FFE Navigators:**
  - **Required: 7** courses and corresponding assessments with an **80% pass rate**.
  - **Optional: 5** optional courses and an assister feedback assessment are included in the curriculum.

Assisters must fulfill all training and certification requirements prior to Open Enrollment.

# What's New in the MLMS?

- New curricula configuration and certificates for assister training will be the same for the foreseeable future.
- Added feature to alert learners if pop-up blockers are enabled.
  - Pop-up blockers should not be enabled.



**MLMS - Assister Portlet**

**The 2019 Certified Application Counselor and Non-Navigator Assister Certification Training is available beginning today July 9, 2018.**

We are pleased to invite Certified Application Counselors and other non-Navigator assisters to take the 2019 Assister Certification Training beginning today, July 9, 2018.

The training is hosted by the Marketplace Learning Management System (MLMS); the online web-based training platform for assisters providing application and enrollment assistance to consumers in Federally-Facilitated Marketplaces (FFMs), including State Partnership Marketplaces (SPMs), and certain State-based Marketplaces using the Federal platform (SBM-FPs). The training can be accessed through the CMS Enterprise Portal by logging in or registering as a new user, <https://portal.cms.gov/wps/portal/unauthportal/selfservice/newuserregistration/>. Existing users can login at: <https://portal.cms.gov>.

We hope that you are able to participate in the Wednesday, July 11 webinar at 2pm ET on the 2019 training and certification requirements. You can view the webinar slides here: <https://marketplace.cms.gov/technical-assistance-resources/training-materials/introduction-to-assister-training.pdf>.

You can find training presentations and additional resources, such as Frequently Asked Questions (FAQs), and MLMS Quick Reference Guides at the following link: <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html>.

*Note: As a result of the Certified Application Counselor Designated Organization (CDO) Refresh, all CDOs assisting consumers for Plan Year 2019 will be assigned a new organizational designation ID. CDOs have been instructed to discontinue use of their old CDO IDs and use their newly issued CDO ID for official purposes moving forward (to generate and issue CAC IDs, take the annual certification training, and enter on the Marketplace Application when assisting consumers).*

*CACs should wait to take the 2019 CAC training until they have been issued their new CAC ID number. CACs should enter their new CAC ID number as the username on the MLMS training registration page.*

# Steps to Certification Completion

## *Prepare Your System*

- **Prepare Your Computer System**
- Register for CMS Secure Portal ID
- Request Access to MLMS
- Access MLMS
- Enroll in Curriculum
- Complete Required Training
- Print Certification
- Relaunch Completed Course
- Assister Feedback



# Prepare Your Computer System

## *Company vs Personal Computer*

- 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 MLMS access.
- If you experience technical issues, complete your training on your personal laptop or computer.
- If you don't have access to a laptop or computer, we suggest you visit your local library.

# Steps to Prepare Your System

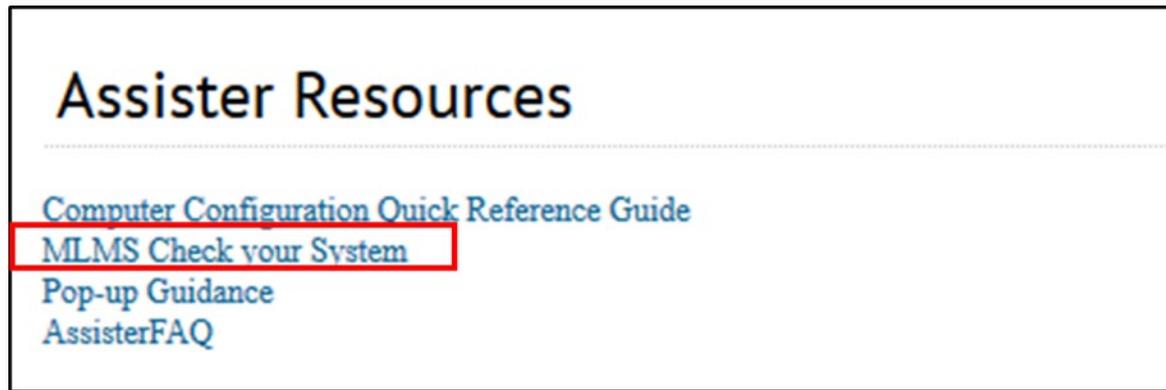
## *Pre-Login*

1. JavaScript needs to be enabled for successful use of the CMS Secure Portal.
  - [Enable Java](#)
2. Download latest version of Adobe Flash.
  - [Adobe Flash](#)
  - Follow the on-screen instructions.
    - ❖ You may select the anti-virus software if you desire.
3. Allow pop-up windows for following URL.
  - Open up your browser (Firefox, Chrome, or IE).
  - Firefox instructions: From the toolbar select, **Tools -> Options -> Content -> Exceptions**.
  - Then type **portal.cms.gov** in the **Address of website** field.
  - If your version is different, use the support link listed below for pop-up blockers [Chrome instructions](#) / [Firefox instructions](#) / [Internet Explorer](#).

# Steps to Prepare Your System

## *Post-Login*

1. Once logged in to MLMS\*, verify your computer is ready by selecting the **MLMS Check your System** link from the MLMS Assister Portlet located under **Assister Resources**.



\*MLMS login steps are located on slide 26 of this presentation.

# Steps to Prepare Your System

## *Post-Login (Cont.)*

1. After selecting the **MLMS Check your System** link, you may view the information below displayed on the MLMS Check Your System screen.
  - Use this information as a guide to modify your computer/laptop settings (if necessary) for an ideal training experience.
  - Complete the steps below **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.

<b>MLMS Check your System</b>		
The following browser compatibility tests represent the minimum and recommended settings that will allow you to view the majority of MLMS courseware in your internet browser.		
	<b>Recommended Settings</b>	<b>Your System Results</b>
1 <b>Javascript Status</b>	Enabled	<b>JavaScript is Enabled</b>
2 <b>Internet Browser</b>	Firefox,Chrome,Internet Explorer	<b>Firefox (75)</b>
3 <b>Screen Resolution</b>	1024 x 768	<b>1920 x 1080</b>
4 <b>Pop-Up Blocker</b>	Not Blocked	<b>Not Blocked</b>
5 <b>Cookies Enabled</b>	Yes	<b>Yes</b>



# Steps to Certification Completion

## *Register for CMS Secure Portal*

- Prepare Your Computer System
- **Register for CMS Secure Portal ID**
- Request Access to MLMS
- Access MLMS
- Enroll in Curriculum
- Complete Required Training
- Print Certificate
- Relaunch Completed Course
- Assister Feedback

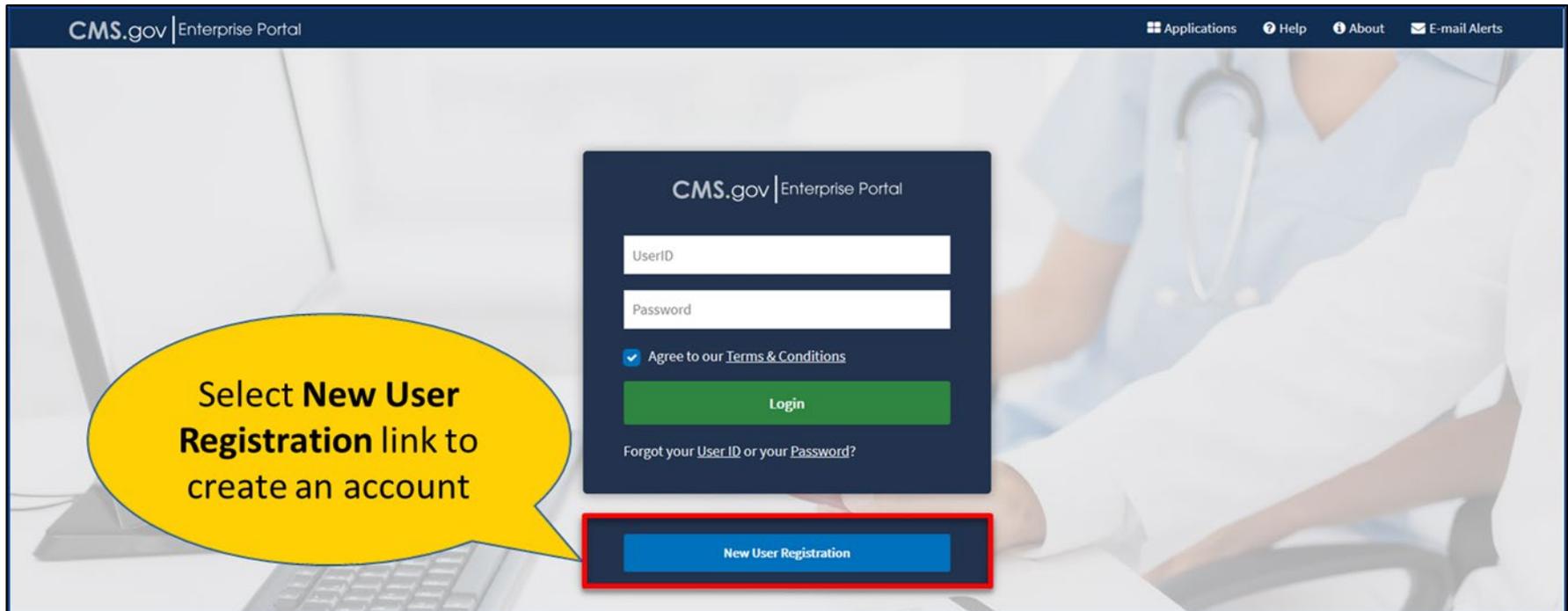


# Steps to Register for CMS Secure Portal ID

1. Select **New User Registration** link
2. Select **MLMS** application
3. Agree to the **Terms and Conditions**
4. Register **Your Information**
5. Create a unique **User ID** and **Password**
6. Complete **3 Challenge Questions**
7. Review **Registration Summary**

Complete these steps if you **do not** have a CMS Secure Portal account and/or have never logged in to MLMS.

# Step 1: Select New User Registration Link



The screenshot shows the CMS.gov Enterprise Portal interface. At the top left, the text 'CMS.gov | Enterprise Portal' is displayed. At the top right, there are links for 'Applications', 'Help', 'About', and 'E-mail Alerts'. The main content area features a dark blue login form with the following elements: 'User ID' and 'Password' input fields, a checked checkbox for 'Agree to our Terms & Conditions', a green 'Login' button, and a link for 'Forgot your User ID or your Password?'. Below the login form, a blue button labeled 'New User Registration' is highlighted with a red rectangular border. A yellow speech bubble on the left side of the page contains the text: 'Select **New User Registration** link to create an account'.

The CMS Secure Portal is the entry point for Assister training. Select **New User Registration** link to create an account.

# Step 2: Select MLMS Application

## Step 3: Agree to Terms and Conditions

### Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

Federally Facilitated Market Place (FFM)/Request for MLMS Training Access

#### Terms & Conditions

OMB No.0938-1236 | Expiration Date: 03/31/2021 | [Paperwork Reduction Act](#)

#### Consent to Monitoring

By logging onto this website, you consent to upload information and/or change information on this web site. This information is subject to the Privacy Act of 1974, the Freedom of Information Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to review the [HHS Rules of Behavior](#).

I agree to the Terms & Conditions

Select Federally Facilitated Marketplace

Check the box to agree to terms

Select Next

# Step 4: Register Your Information

**Step #2: Register Your Information**

Step 2 of 3 - Please enter your personal and contact information.  
All fields are required unless marked 'Optional'.

Enter First Name  Enter Middle Name (optional)  Enter Last Name  Suffix (optional)

Enter Social Security Number (optional)  Birth Month  Birth Date  Birth Year

Is Your Address US Based?  
 Yes  No

Enter Home Address #1  Enter Home Address #2 (optional)

Enter City  State  Enter Zip Code  Enter Zip+4 (optional)

Enter E-mail Address  Confirm E-mail Address

Enter Phone Number

Select Next

Complete each required field as indicated.  
You do not need to complete the **Social Security Number** field.

# Step 5: Create Unique ID and Password

## Step 6: Answer Challenge Questions

**Step #3: Create User ID, Password & Challenge Questions**

Step 3 of 3 - Please create User ID and Password, Select Challenge questions and provide answers.

Enter User ID

Enter Password  Enter Confirm Password 

Select Challenge Question #1  Enter Challenge Question #1 Answer

Select Challenge Question #2  Enter Challenge Question #2 Answer

Select Challenge Question #3  Enter Challenge Question #3 Answer

Back **Next**

Populate all required fields

Select Next

If you **forget your User ID or password**, you will need to know the answer to the **Challenge Questions**. Write the answers down and keep them safe.

# Step 7: Review Registration Summary



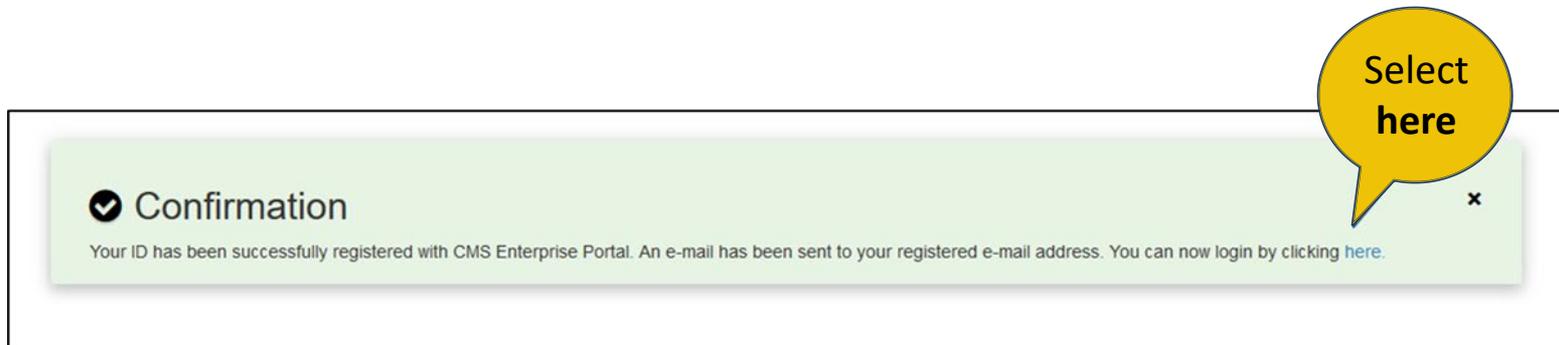
**Registration Summary**

Please review your information and make any necessary changes before submitting.

MLMS: Marketplace Learning Management System

Review and verify your information

The image shows a screenshot of a 'Registration Summary' page. The page has a title 'Registration Summary' and a sub-header 'Please review your information and make any necessary changes before submitting.' Below this is a grey bar containing the text 'MLMS: Marketplace Learning Management System' and a small downward arrow icon. A yellow speech bubble callout points to the right side of the page with the text 'Review and verify your information'.



**Confirmation**

Your ID has been successfully registered with CMS Enterprise Portal. An e-mail has been sent to your registered e-mail address. You can now login by clicking [here](#).

Select here

The image shows a screenshot of a 'Confirmation' message. The message is displayed in a light green box with a checkmark icon and the title 'Confirmation'. The text reads: 'Your ID has been successfully registered with CMS Enterprise Portal. An e-mail has been sent to your registered e-mail address. You can now login by clicking here.' A yellow speech bubble callout points to the 'here' link with the text 'Select here'.

After verifying your information, the **Confirmation page** will open. Use the **here** link to login to the CMS Secure Portal.

# Steps to Certification Completion

## *Request Access to MLMS*

- Prepare Your Computer System
- Register for CMS Secure Portal ID
- **Request Access to MLMS**
- Access MLMS
- Enroll in Curriculum
- Complete Required Training
- Print Certificate
- Relaunch Completed Course
- Assister Feedback



# Steps to Request Access to MLMS

1. Login to **CMS Secure Portal**
2. Select **Request/Add Apps**
3. Search for **FFM/Request Access**
4. Select **System Description/Assisters Role**
5. Verify **Identity**

# Step 1: Login to CMS Portal

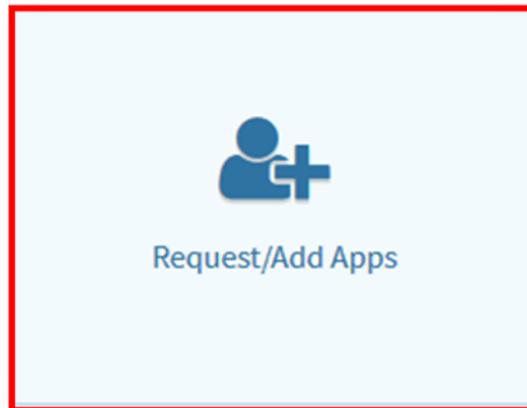
The screenshot shows the CMS.gov Enterprise Portal login interface. At the top, the header includes 'CMS.gov | Enterprise Portal' on the left and navigation links for 'Applications', 'Help', 'About', and 'E-mail Alerts' on the right. The main content area features a dark blue login form with a white border. The form contains a 'UserID' input field, a 'Password' input field, a checked checkbox for 'Agree to our Terms & Conditions', a green 'Login' button, and a link for 'Forgot your UserID or your Password?'. Below the login form is a blue 'New User Registration' button. Three yellow callout bubbles provide instructions: one points to the input fields with the text 'Enter User ID and Password', another points to the checkbox with 'Select checkbox to Agree to our Terms & Conditions', and a third points to the 'Login' button with 'Select Login'.

Input your unique **User ID** and **Password** to gain access to the portal.

# Step 2: Select Request/Add Apps

## My Portal

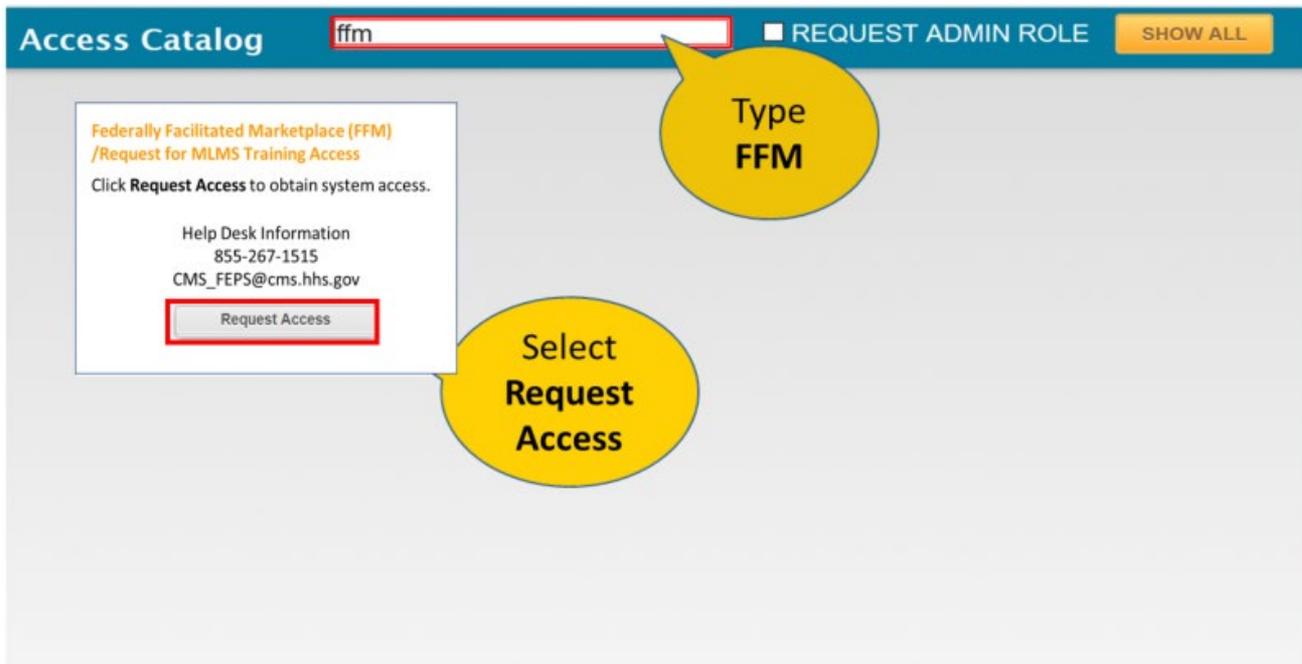
Use the below link to request access to CMS Systems/Applications.



Select  
Request/  
Add Apps

You only need to request access to **FFM Training/MLMS** one time.

# Step 3: Search for FFE/Training



Initially, several options will appear on this page. Type **FFM** into the **Access Catalog** field to populate the tile and select **Request Access**.

# Step 4: Select System Description/Assister Role

The screenshot shows the 'Request New System Access' page on the CMS.gov My Enterprise Portal. The page header includes 'CMS.gov My Enterprise Portal', 'My Apps', 'Kname Lname', 'Help', and 'Log Out'. A sidebar on the left contains 'My Access' with links for 'Request New System Access', 'View and Manage My Access', and 'Annual Certification'. The main content area is titled 'Request New System Access' and includes instructions: 'Select a System and then a role to request access.' and 'Depending on your Level of Assurance (LOA) and the role that you request access to, the system security requirements you may need to complete Identity Verification, establish credentials for Multi-Factor Authentication (MFA), or change your password the next time you login to the system. This may require you to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until Identity Verification is complete and Multi-Factor Authentication (MFA) is established.'

Two dropdown menus are highlighted with red boxes and callouts:

- The 'System Description' dropdown is set to 'FFM/MLMS Training Access', with a callout bubble saying 'Select FFM/MLMS Training Access'.
- The 'Role' dropdown is set to 'Select the Role', with a callout bubble saying 'Select Assister'.

At the bottom of the form, there are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red box and a callout bubble saying 'Select Submit'.

The screenshot shows a 'Successful Completion!' message. The text reads: 'To complete your access request for the Marketplace Learning Management System (MLMS), please log-out by clicking the "OK" button below. To log back in, please click the "Login to CMS Secure Portal" button on the right side of the CMS Enterprise Portal.' Below the text is an 'OK' button, which is highlighted with a red box and a callout bubble saying 'Select Ok'.



# Steps to Certification Completion

## *Access to MLMS*

- Prepare Your Computer System
- Register for CMS Secure Portal ID
- Request Access to MLMS
- **Access MLMS**
- Enroll in Curriculum
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- Relaunch Completed Course
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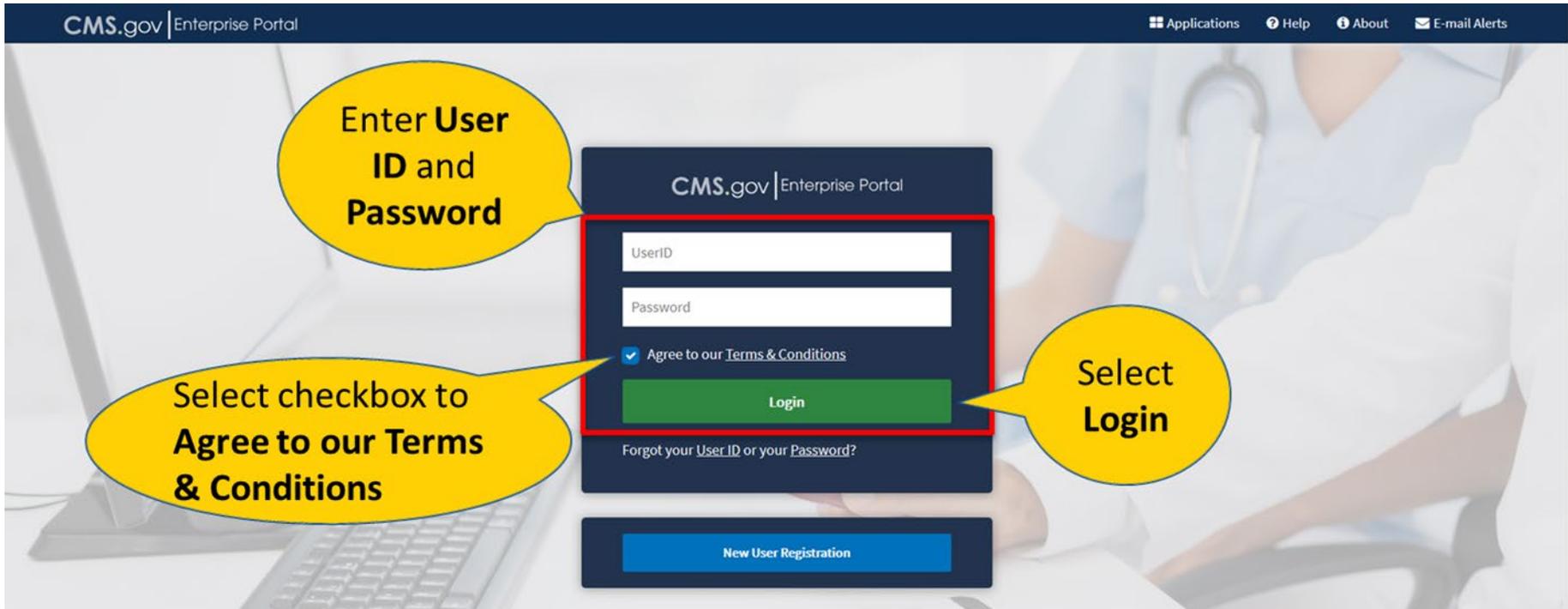
# Steps to Access MLMS

1. Login to **CMS Secure Portal**
2. Select **MLMS Training** tile
3. Review information on **Profile Page** and use **Assigned Navigator, CAC, SB ID**
4. Access **MLMS Assister Portlet Landing Page**

If you used the MLMS last year, you should already have a CMS Secure Portal ID and password to access MLMS. If not, follow these steps.

# Step 1: Login to CMS Portal

## *Access MLMS*



The image shows a screenshot of the CMS.gov Enterprise Portal login page. The page has a dark blue header with the CMS.gov logo and 'Enterprise Portal' text. On the right side of the header, there are links for 'Applications', 'Help', 'About', and 'E-mail Alerts'. The main content area is a dark blue box containing the login form. The form has two input fields: 'UserID' and 'Password'. Below these fields is a checkbox labeled 'Agree to our Terms & Conditions' which is checked. A green 'Login' button is positioned below the checkbox. Below the 'Login' button is a link that says 'Forgot your UserID or your Password?'. At the bottom of the form is a blue 'New User Registration' button. Three yellow callout bubbles are overlaid on the form: one pointing to the input fields with the text 'Enter User ID and Password', one pointing to the checkbox with the text 'Select checkbox to Agree to our Terms & Conditions', and one pointing to the 'Login' button with the text 'Select Login'.

CMS.gov | Enterprise Portal

Applications Help About E-mail Alerts

Enter User ID and Password

CMS.gov | Enterprise Portal

UserID

Password

Agree to our [Terms & Conditions](#)

Login

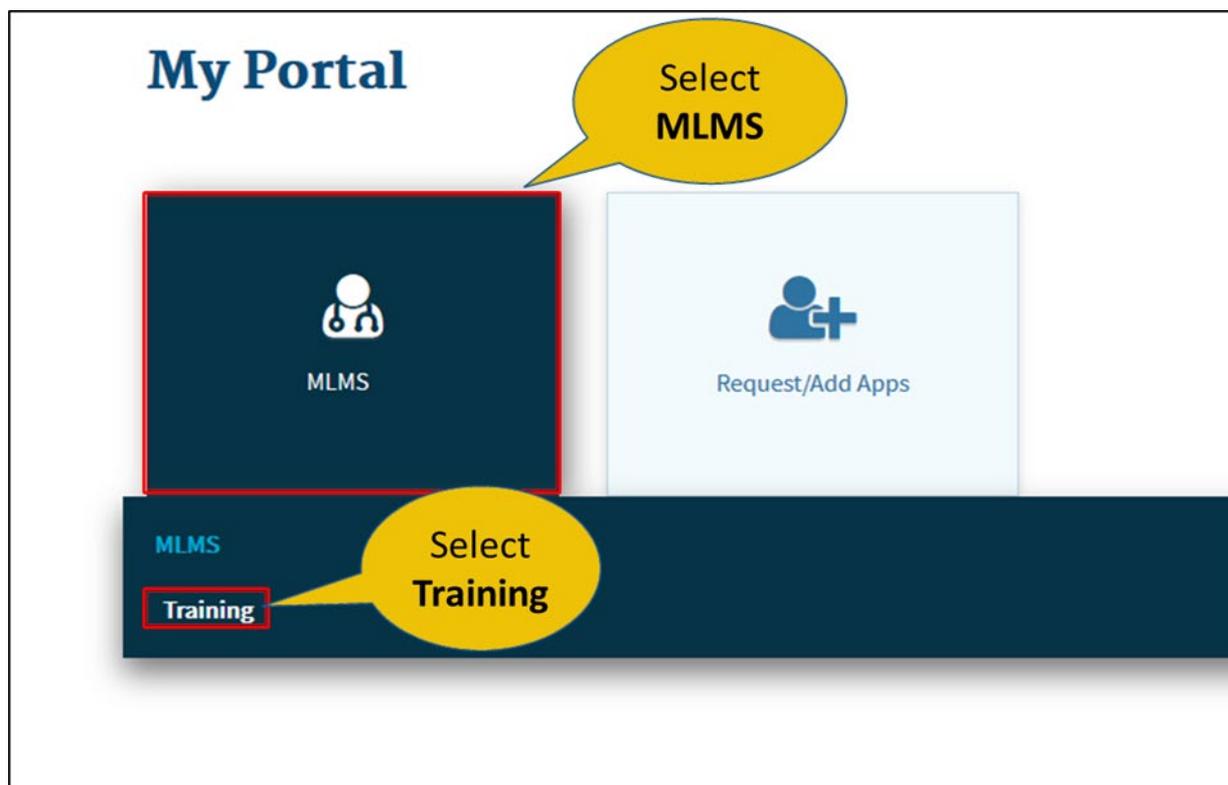
Select Login

Forgot your [User ID](#) or your [Password](#)?

New User Registration

If you have **forgotten** your User ID or password, select the appropriate link below for assistance.

# Step 2: Select MLMS Training Tile



If the **MLMS** tile does not appear on the portal page, go to **slide 19** for instructions on how to request **MLMS** access.

# Step 3: Complete Profile Fields and Use Assigned Navigator ID

- All individual Navigators should ensure they register for and complete the 2021 Navigator training.
- Use the unique Navigator ID number assigned by the CMS Navigator grantee organization they are affiliated with:
  - Unique Navigator ID numbers were be made available to CMS Navigator grantee organizations following the announcement of grant awards for the 2018-2020 period of performance.
- Use the unique Navigator ID number to ensure the Navigator certificate issued reflects the current ID number and the current affiliation with a CMS Navigator grantee organization.

# Step 3: Complete MLMS Assister Profile Page

## *New Navigator*

### MLMS Assister Profile Page

Welcome to the MLMS Assister profile page! All assisters are required to complete your assister information using the appropriate assister type. If you work for a Federal Navigator grantee organization, please be sure to provide your valid Navigator ID. If you work for a Certified Application Counselor Designated Organization (CDO), you will be prompted to provide the valid CAC ID that has been assigned. Likewise, if you work for an organization operating on the State-Based Exchange using the Federal platform (SBE-FP), kindly provide your SBE-FP Assister ID. All other assister types, please add your pertinent information.

NOTE: For any new or existing users, remember to verify your information and click the “Save/Update” button to access your training.

Assister Type: \*

Organization Type: \*

Navigator ID (Required for Navigator):\*

Select  
Save/Update

# Step 3: Complete MLMS Assister Profile Page

## *Returning Navigator*

**MLMS Assister Profile Page**

Welcome to the MLMS Assister profile page! All assisters are required to complete your assister information using the appropriate assister type. If you work for a Federal Navigator grantee organization, please be sure to provide your valid Navigator ID. If you work for a Certified Application Counselor Designated Organization (CDO), you will be prompted to provide the valid CAC ID that has been assigned. Likewise, if you work for an organization operating on the State-Based Exchange using the Federal platform (SBE-FP), kindly provide your SBE-FP Assister ID. All other assister types, please add your pertinent information.

NOTE: For any new or existing users, remember to verify your information and click the “Save/Update” button to access your training.

Assister Type: \*

Organization Type: \*

Navigator ID (Required for Navigator):\*

**Select Save/Update**

**Save/Update**

Complete required fields and select Save/Update. Returning Navigator accounts will be validated upon log-in. If the system is unable to certify the account, you will be prompted to contact the appropriate help desk.

# Step 3: Complete MLMS Assister Profile Page

## *Certified Application Counselor*

- All individual CACs should ensure they register for and complete the 2021 CAC training curriculum.
- Use the unique CAC ID number assigned by the grantee organization you are affiliated with.

**MLMS Assister Profile Page**

Welcome to the MLMS Assister profile page! All assisters are required to complete your assister information using the appropriate assister type. If you work for a Federal Navigator grantee organization, please be sure to provide your valid Navigator ID. If you work for a Certified Application Counselor Designated Organization (CDO), you will be prompted to provide the valid CAC ID that has been assigned. Likewise, if you work for an organization operating on the State-Based Exchange using the Federal platform (SBE-FP), kindly provide your SBE-FP Assister ID. All other assister types, please add your pertinent information.

NOTE: For any new or existing users, remember to verify your information and click the "Save/Update" button to access your training.

Assister Type: \* FFE Certified Application Counselor ▼

Organization Type: \* Certified Application Counselor Designated Organization (CDO) ▼

CAC ID: \*

Enter CAC ID here

Select Save/Update and Next

Save/Update Next

New this year – CACs must include their CAC ID in their profile.

# Step 3: Complete MLMS Assister Profile Page

## *State Based Exchange Using the Federal Platform*

**MLMS Assister Profile Page**

Welcome to the MLMS Assister profile page! All assisters are required to complete your assister information using the appropriate assister type. If you work for a Federal Navigator grantee organization, please be sure to provide your valid Navigator ID. If you work for a Certified Application Counselor Designated Organization (CDO), you will be prompted to provide the valid CAC ID that has been assigned. Likewise, if you work for an organization operating on the State-Based Exchange using the Federal platform (SBE-FP), kindly provide your SBE-FP Assister ID. All other assister types, please add your pertinent information.

NOTE: For any new or existing users, remember to verify your information and click the "Save/Update" button to access your training.

Assister Type: \*

Organization Type: \*

SBE-FP Assister ID:

Organization Name:

Organization Street Address:

Organization City:

Organization State:

Organization Zip Code:

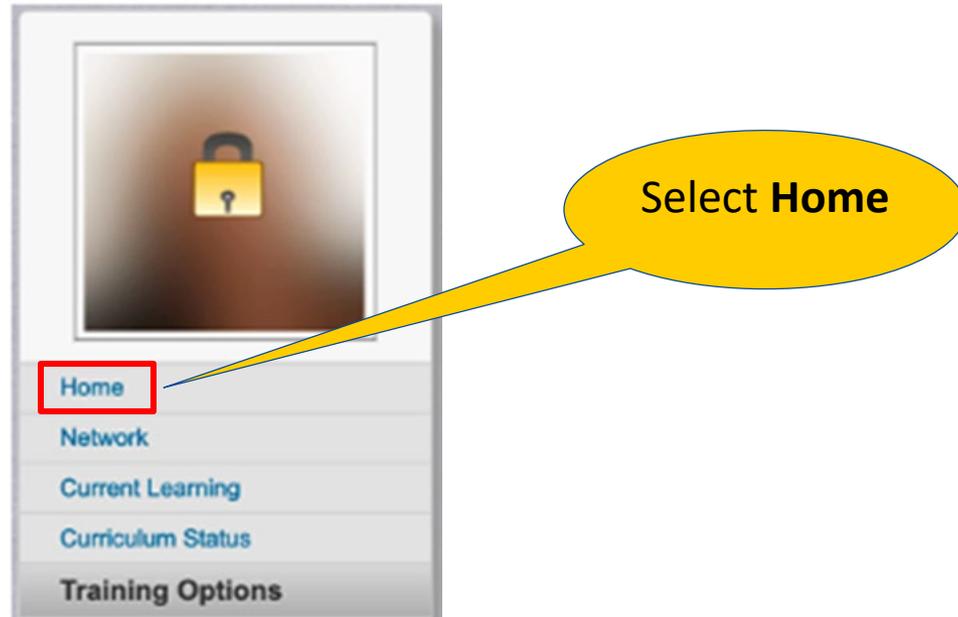
Organization Phone Number:

Email:

Select **SBE-FP** from the Organization Type drop-down menu

Select **Save/Update**

# Step 4: Access MLMS Assister Portlet Landing Page



This is the MLMS Assister Portlet Landing page. To return to this page at any time, select **Home** on the left navigator bar.

# Steps to Certificate Completion

## *Enroll in Curriculum*

- Prepare Your Computer System
- Register for CMS Secure Portal ID
- Request Access to MLMS
- Access MLMS
- **Enroll in Curriculum**
- Complete Required Training
- Print Certificate
- Relaunch Completed Course
- Assister Feedback



# Steps to Enroll in Curriculum

1. Select **Training Options** to begin Enrollment
2. Select **Complete Enrollment**
3. Select **Go To Current Learning** and **Launch** to begin a course

# Step 1: Select Actions and Then Enroll

The screenshot shows the 'Training Options' page. A sidebar on the left contains navigation links: Home, Network, Current Learning, Curriculum Status, and Training Options (which is highlighted). The main content area is titled 'Training Options' and includes a message: 'You have been recommended to you.' Below this, there are filters for 'Recommended in the Past (Days) 10' and 'Recommendation Type All'. A 'Restore Defaults' button is also visible. A table of 'Active Recommendations' is shown with columns: Recommendation, Recommendation Type, Sources, Recommended On, and Actions. The first row is for 'PY20XX Certified Application Counselor (CAC) Curriculum' with sources '(1)CAC' and recommended on '04/23/2020'. The 'Actions' column for this row contains a 'View Detail Begin Enrollment' link and an 'Actions' button. Three yellow callout bubbles point to the 'Training Options' sidebar link, the 'Actions' button, and the 'View Detail Begin Enrollment' link.

Recommendation	Recommendation Type	Sources	Recommended On	Actions
PY20XX Certified Application Counselor (CAC) Curriculum	Curriculum	(1)CAC	04/23/2020	View Detail Begin Enrollment Actions

To view required curriculum, go to the **Training Options** page. Select **Actions** next to course name, then select **Begin Enrollment**.

# Step 2: Select Complete Enrollment

The screenshot shows a web interface for registering for a curriculum. The title is "Register for PY20XX CAC Curriculum". Below the title is a ribbon icon and a paragraph of instructions: "To register for PY20XX CAC Curriculum, verify the path, select modules and learning elements within the module that you would like to complete. See complete registration guidelines." There are fields for "Path:" and "Note:". A yellow callout bubble points to the "Path:" field with the text "Select All Required Courses". Below the instructions is a section for "PY2021 TRAINING MODULE (Complete 23 of 23 Required) Required". A list of modules is shown, with the first one checked: "PY20XX Assister 001 Training Overview (Course : 00003739, Version PY2021.1.1)". Below this, details for the offering are shown: "Offering ID: 00003884", "Language: English", and "Offered As: Web Based Training". A "Suggested" label and a "Change Offering" link are also present. A red box highlights the "Complete Enrollment" button in the top right corner, with a yellow callout bubble pointing to it that says "Select Complete Enrollment".

The curriculum is displayed under **Register for PY 20XX CAC Curriculum**. Select the **Required Modules**, then select **Complete Enrollment**. Notice some modules include both a course and an assessment to complete.

# Step 3: Select Go To Current Learning

## Step 4: Select Launch

The screenshot displays a user interface for a learning management system. On the left, a navigation menu includes 'Home', 'Network', 'Current Learning' (highlighted with a red box), 'Curriculum Status', and 'Training Options'. The main content area is titled 'Current Learning' and shows a list of courses. The first course is 'PY20XX Assister 012 Advanced Marketplace Issues and Technical Support' with a status of 'Confirmed' and a registration date of '04/23/2020'. Below the course details, there is a 'Launch' button highlighted with a red box. Two yellow callout bubbles are present: one pointing to the 'Current Learning' menu item with the text 'Select Current Learning', and another pointing to the 'Launch' button with the text 'Select Launch'.

To begin a course or assessment go to the **Current Learning** page. A new window open on top of the page displaying the training course or assessment.

# Steps to Certificate Completion

## *Complete Required Training*

- Prepare Your Computer System
- Register for CMS Secure Portal ID
- Request Access to MLMS
- Access MLMS
- Enroll in Curriculum
- **Complete Required Training**
- Print Certificate
- Relaunch Completed Course
- Assister Feedback



# Steps to Complete Required Training

1. Select **Next** to **Advance Training**
2. Select **ALL Links** on the screen
3. 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
4. Take screen shot of **Course Completion** page
5. Review **Completion Status** as **Detailed Status View** or **Graphical View**

# Step 1: Select Next to Advance Training

You need to be aware of these training disclaimers.  
Select "Next" on the tablet to read each of these disclaimers.

**SHOP Assistance**

For plan years beginning on or after January 1, 2018, states with a federally-facilitated SHOP Marketplace (FF-SHOP) or a State-based Marketplace (SBM) using the federal SHOP platform will no longer offer employee eligibility, premium aggregation, or online enrollment functionality. Instead, qualified employers can purchase and enroll employees in SHOP plans by working with a qualified health plan (QHP) issuer or SHOP-registered agent or broker.

However, small employers in states with a FF-SHOP or SBM using the federal SHOP platform can continue to use the SHOP website to:

1. Learn about the benefits of SHOP, including tax credits for qualified employers;
2. Compare available medical and dental plans side by side using the SHOP See Plans and Prices tool; and
3. Submit SHOP employer applications and obtain eligibility determinations.

Select **Next** to advance through the course

Menu / Help / Glossary / Resources / Map / Module 1 of 11 Back < Page 1 of 4 > Next

On the training course window, use the **Next** button to advance through the course and the **Back** button on the course window to return to a previous page in the course.

# Step 2: Select All Links

The Affordable Care Act also established the Health Insurance Marketplaces. Eligible consumers who don't have health insurance through a job, Medicare, Medicaid, CHIP, or another source that provides [qualifying health coverage](#) can get coverage through the Marketplaces for individuals and families.

To be eligible for coverage through a Marketplace, individuals and families must:

-  Be United States (U.S.) citizens or U.S. nationals, or noncitizens who are lawfully present in the U.S. for the entire time they plan to have health coverage
-  Not be [incarcerated](#) (unless pending the disposition of charges, i.e., being held without having been formally convicted of a crime)
-  Live in the U.S. and meet state residency requirements for the Marketplace when you apply

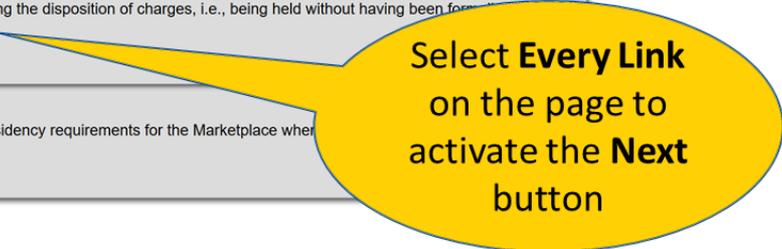
Learn about [eligible immigration statuses](#).

The Marketplaces allow consumers to:

- Use a single streamlined application to find out if they're eligible for coverage
- Conduct an apples-to-apples comparison of [qualified health plans](#) (QHPs)

Individuals and families can also apply for programs to help lower their costs through the Marketplaces.

Menu / Help / Glossary / Resources / Map / Module 2 of 11 Back < Page 3 of 8 > Next



The **Next** button is not active until all Key Tips, Knowledge Checks, and Tool Tips are selected.

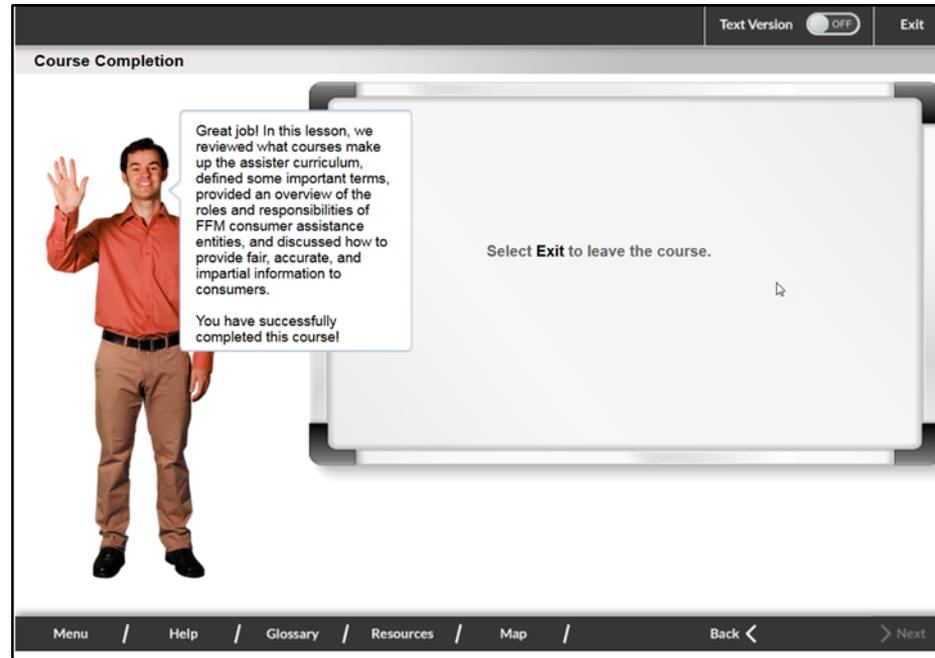
# Step 3: Select Exit

The image displays two screenshots of a course interface. The top screenshot shows a page titled "Overview of the Affordable Care Act" with a navigation bar containing "Text Version" (set to OFF) and an "Exit" button. A yellow callout bubble points to the "Exit" button with the text "Select Exit to leave course before it's complete". The page content includes sections on "The Health Insurance Marketplaces" and eligibility requirements. The bottom screenshot shows a page titled "Marketplace Exemptions and Appeals Assistance" with a score of 90% and a message: "Please click the EXIT button in the upper right hand corner of the screen to exit this assessment." A yellow callout bubble points to the "Exit" button in the top right corner with the text "Select Exit when you complete the course".

During the course the **Exit** button can be used to bookmark your place. Once the course is complete the **Exit** button is used to leave the course.

# Step 4: Take Screenshot of Course Completion Page

- Use the link provided for instructions on how to [print your screen](#).



Take a screenshot of the **Course Completion** page for your records.

# Step 5: Review Completion Status

## Detailed Status View

### PY20XX CAC Curriculum (PY20XX.1)



<b>Assigned By</b>	david root	<b>Acquired On</b>	04/27/2020
<b>Assigned On</b>	04/27/2020	<b>Mastery Score</b>	N/A
<b>Status</b>	Acquired	<b>Expiration Date</b>	10/31/2016

MOD 1 - 100% Completed

[Back](#)

**Main** Recent Course History Complete Progress Report

Graphical View

Detailed Status View

**Path** MOD 1  
**Completion Requirement** 1 of 2 Modules Required  
**Status** Completed

**Module 1 (Required)** (Required - 2 of 2 Learning Items Required)  
**Status** Completed **Score** 0.0 **Progress:** 2 of 2 Learning Items Completed

PY20XX 001 Assister Training Overview Completed

(Recommended Offering)  
Duration(HH:MM): 00:00

# Step 5: Review Completion Status

## Graphical View

### PY20XX CAC Curriculum (PY2021.1)



<b>Assigned By</b>	david root	<b>Acquired On</b>	04/27/2020
<b>Assigned On</b>	04/27/2020	<b>Mastery Score</b>	N/A
<b>Status</b>	Acquired	<b>Expiration Date</b>	10/31/2016

Main

Recent Course History

Complete Progress Report

Graphical View

Detailed Status View



**Path** MOD 1  
**Completion Requirement** 1 of 2 Modules Required  
**Status** Completed

#### Module 1 (Required) **REQUIRED**

**Status:** Complete **Progress:** 2 of 2 Required Items Completed

**Score:** 0.0

**PY20XX 001 Assister Training Overview**

Completed on 04/27/2020



**PY2020 Assister 002 Health Coverage Basics**

Completed on 04/27/2020



# Steps to Certificate Completion

## *Print Certificate*

- Prepare Your Computer System
- Register for CMS Secure Portal ID
- Request Access to MLMS
- Access MLMS
- Enroll in Curriculum
- Complete Required Training
- **Print Certificate**
- Relaunch Completed Course
- Assister Feedback



# Steps to Print Certificate

1. Select **Curriculum Status**
2. Select **Actions** and **Print Certificate**
3. Select **Print**

# Step 1: Select Curriculum Status

## Step 2: Select Actions and Print Certificate

The screenshot shows a web application interface for curriculum management. On the left is a navigation menu with 'Curriculum Status' highlighted. The main area displays a table with one row of curriculum data. A callout bubble points to the 'Curriculum Status' menu item. Another callout bubble points to the 'Actions' column of the table. A third callout bubble points to the 'Print Certificate' link in the actions dropdown menu.

Internal Curriculum  
Showing 1 out of 1 results

Name	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Expired On Date	Registration Date	Mandatory	Actions
PY20XX Returning FFE Navigator	Path 1 - 100% Completed	N/A	Acquired	Rob Halford		10/31/2020	04/23/2020	<input type="checkbox"/>	View Curriculum History View Course History Print Certificate

Home  
Network  
Current Learning  
Curriculum Status  
Training Options

Modify T

Actions  
View Curriculum History  
View Course History  
Print Certificate

Select Curriculum Status

Select Actions

Select Print Certificate

You may need to select the **Activate Adobe Acrobat** link on your screen in order to view and print the certificate.

# Step 3: Print Certificate

## Navigator

### Federally Certified Marketplace Navigator

@@person.first\_name@@ @@person.last\_name@@

@@person.custom\_5@@

@@person.custom\_6@@

The United States Department of Health and Human Services recognizes @@person.first\_name@@ @@person.last\_name@@ of @@person.custom\_5@@ as a federally-certified Marketplace Navigator, certified to assist consumers in understanding new programs, taking advantage of consumer protections, and navigating the health insurance system to find the most affordable coverage that meets the consumer's needs.

Completion of the Navigator Curriculum may not fulfill the requirements to serve as Navigator under state law. To be fully certified as a federally-certified Navigator, individuals must also meet any licensing, certification, or other standards prescribed by the State, if applicable, so long as such standards do not prevent the application of the provisions of title I of the Affordable Care Act. Please consult with your state's Department of Insurance to ensure you are in compliance.

Acquired on: @@certification.acquiredondate@@

Expires on: 10/31/2020



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**Jeffrey D. Grant**

Deputy Center & Operations Director  
Center for Consumer Information & Insurance Oversight  
Centers for Medicare & Medicaid Services



Health Insurance Marketplace

# Step 3: Print Certificate of Completion

## *Certified Application Counselor*

### **Certificate of Completion**

This certificate confirms that

Dave Root

Has successfully completed the following:

Certified Application Counselor (test teststsetsetsCAC) Curriculum

Completion of the CAC Curriculum does not complete the certification process for CACs. The CMS approved CAC Designated Organization (CDO) must certify an individual as a CAC and assign the individual with a CAC identification number upon completion of the CAC Curriculum.

In addition, completion of the CAC Curriculum may not fulfill the requirements to serve as a CAC under state law. To be fully certified as a CAC, an individual must comply with any licensing, certification, or other standards prescribed by the State, if applicable. Please consult with your CDO and your state's

Department of Insurance to ensure you are in compliance.

Acquired on: 08/12/2019

Expired on: 10/31/2020



Health Insurance Marketplace

# Step 3: Print Certificate of Completion

## *State Based Exchange – Federal Platform*

### Certificate of Completion

This certificate confirms that

@@person.first\_name@@ @@person.last\_name@@

Has successfully completed the following:

SBE-FP Assister Curriculum

Completion of the SBE-FP Assister Curriculum may not fulfill the requirements to serve as an in-person assister under state law. To be fully certified as an SBE-FP assister, individuals must comply with all state requirements. Please consult with your sponsoring organization and/ or state

Department of Insurance to ensure you are in compliance.

Acquired on: @@certification.acquiredondate@@



# Step to Certificate Completion

## *Relaunch Completed Course*

- Prepare Your Computer System
- Register for CMS Secure Portal ID
- Request Access to MLMS
- Access MLMS
- Enroll in Curriculum
- Complete Required Training
- Print Certificate
- **Relaunch Completed Course**
- Assister Feedback



# Steps to Relaunch Completed Course

1. Select **Curriculum Status** and **Curriculum Name**
2. Select **Recent Course History** and **View Results**
3. Select **Launch**
4. Course **Opens**

# Step 1: Select Curriculum Status and Curriculum Name

Internal Curriculum [Modify Table](#)

Showing 4 out of 4 results

Name	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Expired On Date	Registration Date	Mandatory <input type="checkbox"/>	Actions
PY2020 Returning FFE Navigator	PY2020 Returning Navigator and CAC - 100% Completed	N/A	Acquired	Amanda Paduchik	09/30/2020	04/24/2019		<input type="checkbox"/>	<a href="#">Actions</a>

Home  
Current Learning  
**Curriculum Status**  
Training Options  
Training

Select Curriculum Status

Select Curriculum Name

Completed modules move from **Current Learning** to the **Curriculum Status** page.

# Step 2: Select Recent Course History and View Results

**Select Recent Course History**

**Select View Results**

PY20XX Returning FFE Navigator (PY20XX.1.0)

Assigned By: david root  
Assigned On: 04/23/2020  
Status: Acquired

Acquired On: 04/23/2020  
Mastery Score: N/A  
Expiration Date: 10/31/2020

More Actions

Main **Recent Course History** Complete Progress Report

View acquisition history for Acquired on 04/23/2020

Learning Elements Completed

Title	Version	Type	Completed On	View Results
<a href="#">PY20XX Assister 001 Training Overview</a>	PY20XX.1.0	Required	04/23/2020	<a href="#">View Results</a>

Select **Recent Course History** to locate the course and select **View Results**.

# Step 3: Select Launch

## Progress Report for PY2020 ASSISTER 004\_\_Privacy\_Security\_and\_Fraud\_Prevention\_Standards

You cannot mark this course complete.

Offering Name PY2020 ASSISTER 004\_\_Privacy\_Security\_and\_Fraud\_Prevention\_Standards

Completion Status Successful

### Learning Assignments

[Modify Table](#)

Module	Assignment Type	Requirement	Details	Completion Status	Completed On	Actions
PY2020 ASSISTER 004__Privacy_Security_and_Fraud_Prevention_Standards	Training Content	Required	Attempts Allowed: Unlimited	Not Evaluated		<a href="#">Launch</a>
PY2020 ASSISTER 004__Privacy_Security_and_Fraud_Prevention_Standards_Exam	Training Content	Required	Attempts Allowed: Unlimited Mastery Score: 80.00	Not Evaluated		

Select  
Launch

Select **Launch** to open the course.

# Step 4: Course Opens



This communication was printed, published, or produced and disseminated at U.S. taxpayer expense.

The training content window appears and course opens.

# Steps to Certificate Completion

## *Assister Feedback*

- Prepare Your Computer System
- Register for CMS Secure Portal ID
- Request Access to MLMS
- Access MLMS
- Enroll in Curriculum
- Complete Required Training
- Print Certificate
- Relaunch Completed Course
- **Assister Feedback**



# Steps to Complete Assister Feedback

1. Select **Launch** and **Begin Survey**
2. Select **Completed Curriculum**
3. Select **Feedback Response**
  - Select **Skip** to not answer a question

# Step 1: Select Launch and Begin Survey

Progress Report for PY20XX Assister Feedback

You cannot mark this course complete.

Offering Name PY20XX Assister Feedback  
Completion Status Not Evaluated  
Score 0

**Learning Assignments** [Modify Table](#)

Module	Assignment Type	Requirement	Details	Completion Status	Completed On	Actions
PY20XX Assister Feedback	Training Content	Required	Attempts Allowed: Unlimited	Not Evaluated		<b>Launch</b>

[Cancel](#)

PY20XX Assister Feedback

**Begin Survey**

The **Assister Feedback** may also be launched from the **Training Options** page.

# Step 2: Select Completed Curriculum

The screenshot shows a survey titled "Assister Feedback" with the question "Which 2020 Assister Course did you take? (Please select one)". There are three radio button options: "A) FFE Certified Application Counselor", "B) SBE-FP Assister", and "C) FFE Navigator". The first option is highlighted with a grey bar. A yellow callout bubble points to this bar with the text "Select Assister Course". At the bottom right, there are two buttons: "Skip" and "Submit". A yellow callout bubble points to the "Submit" button with the text "Select Submit".

Assister Feedback

Which 2020 Assister Course did you take? (Please select one)

A) FFE Certified Application Counselor

B) SBE-FP Assister

C) FFE Navigator

Skip Submit

The **Assister Survey** is launched to allow course feedback.

# Step 3: Select Feedback Response

Assister Feedback

Select Feedback Response

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
	1	2	3	4	5
The scope of the material is appropriate to my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Select Submit

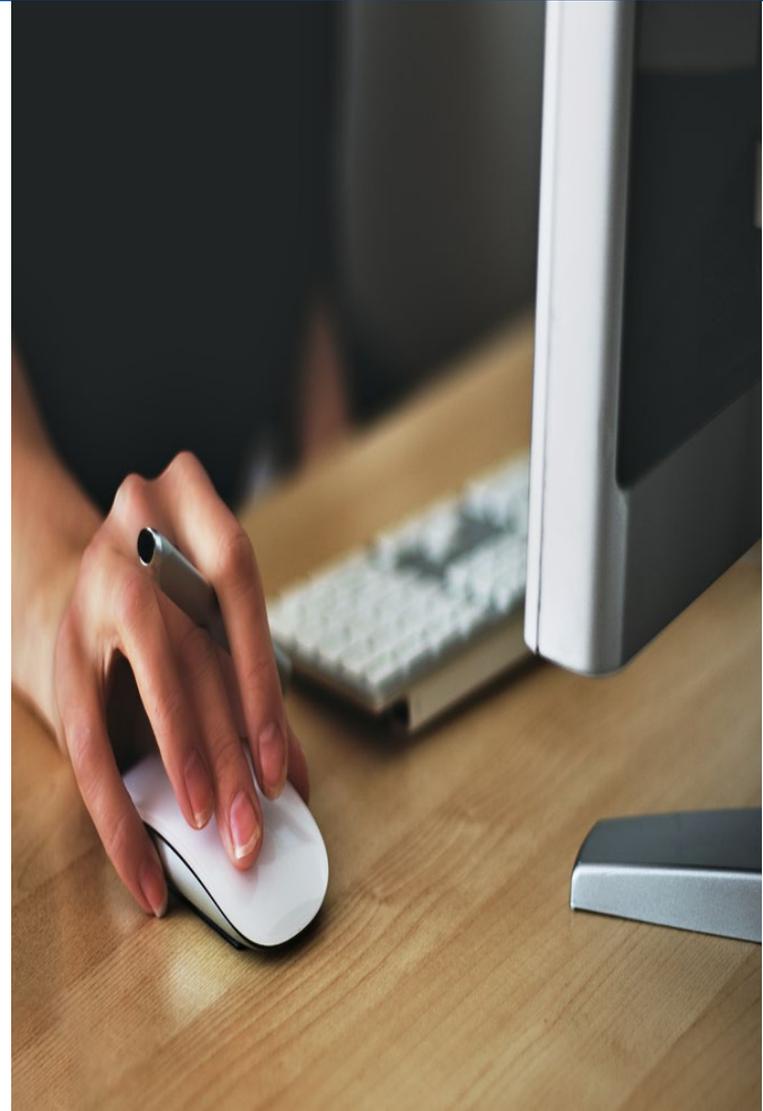
Skip Submit

Select **Skip** to skip any question you don't want to answer or that is not applicable. 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 MLMS.

# Troubleshooting

## *Prepare Your Computer System*

- **Prepare Your Computer System**
- Access MLMS
- Complete Required Training
- Complete Optional Training
- Resources



# Prepare Your Computer System

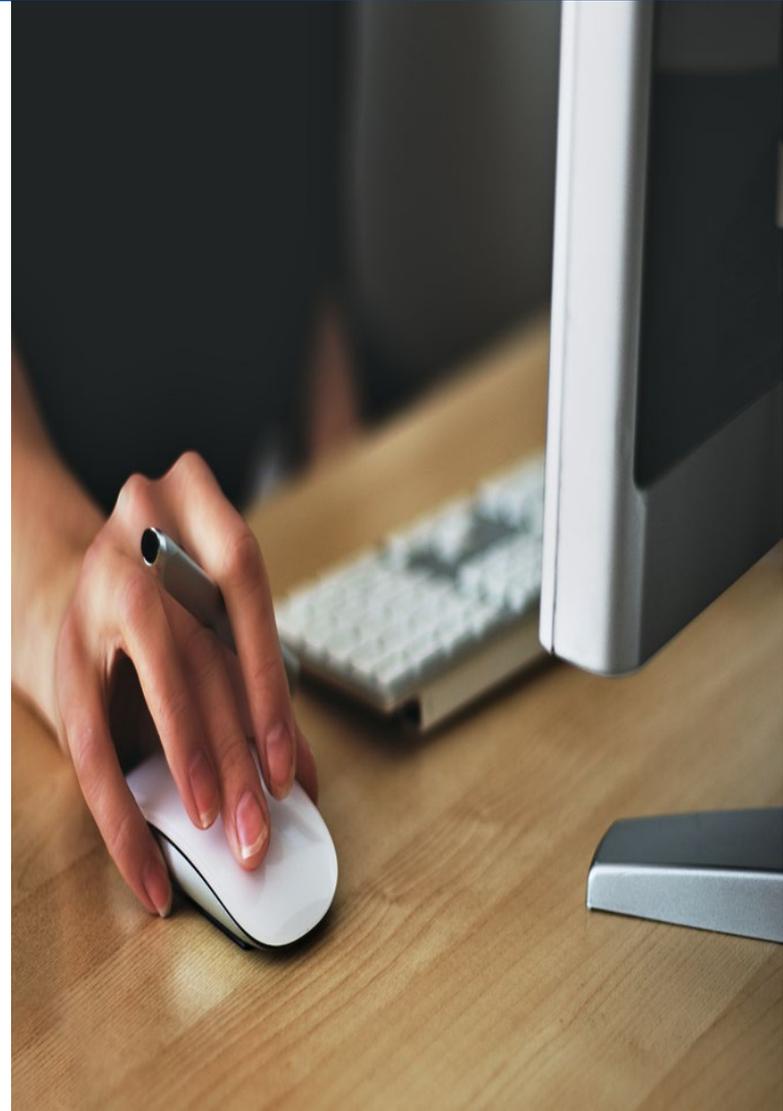
## *Internet Browsers*

- The following are approved browsers:
  - Internet Explorer
  - Chrome
  - Firefox
- If you experience technical issues, we recommend you clear the browser's cache
- Select the appropriate browser link for instructions on how to clear the cache
  - [Internet Explorer 11](#)
  - [Chrome](#)
  - [Firefox](#)

# Troubleshooting

## *Access MLMS*

- Prepare Your Computer System
- **Access MLMS**
- Complete Required Training
- Complete Optional Training
- Resources



# Access MLMS

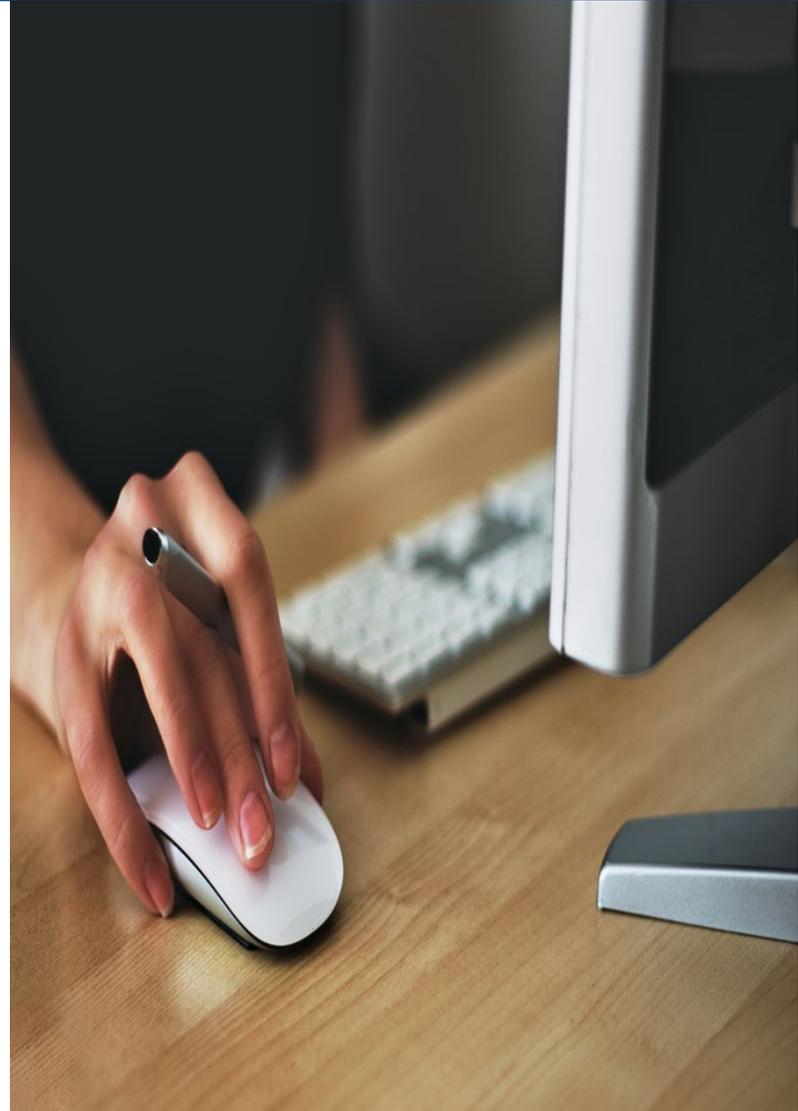
## *MLMS Landing Page*

- If you use Internet Explorer 11 and are not automatically brought to the MLMS Landing page after selecting the **Save/Update** button, select the **Next** button on the redirect screen.

# Troubleshooting

## *Complete Required Training*

- Prepare Your Computer System
- Access MLMS
- **Complete Required Training**
- Complete Optional Training
- Resources



# Complete Required Training

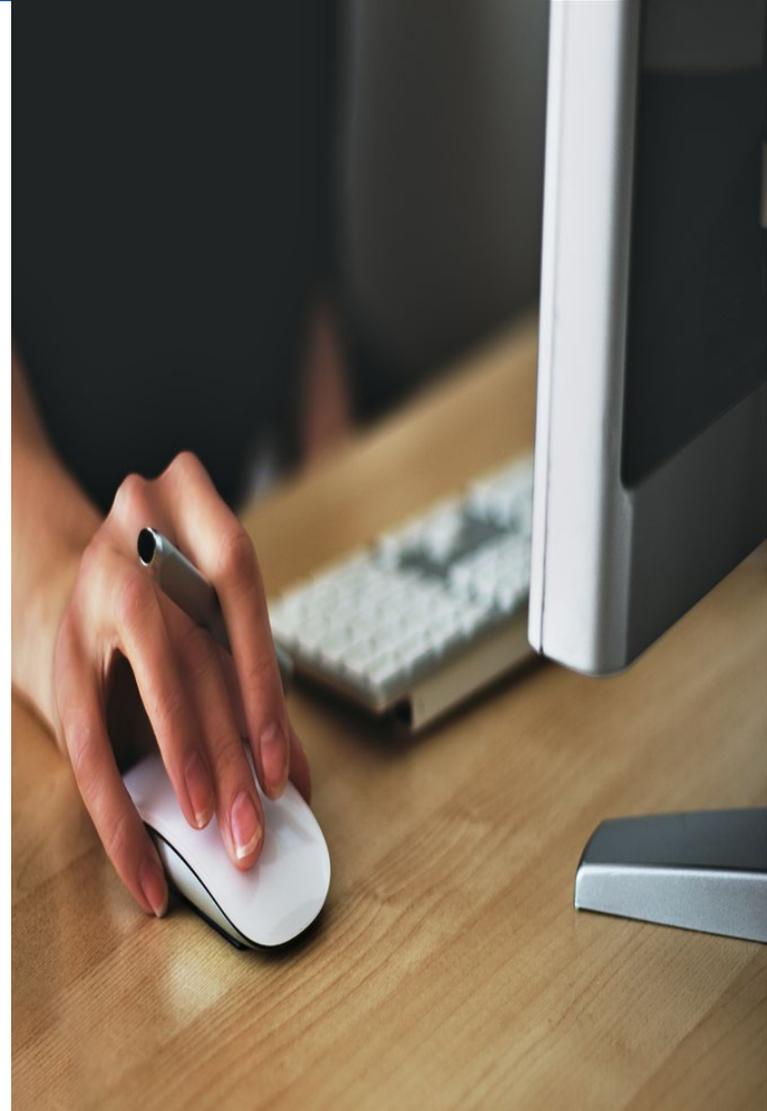
## *Portal Time Out*

- CMS Secure portal times out every 30 minutes.
- Select the Portal window every 28 minutes and look for a pop-up box to continue the current session.
- Don't get distracted while taking training.
- Set a timer for 28 minutes.
- If your sessions times 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.

# Troubleshooting

## *Complete Optional Training*

- Prepare Your Computer System
- Access MLMS
- Complete Required Training
- **Complete Optional Training**
- Resources



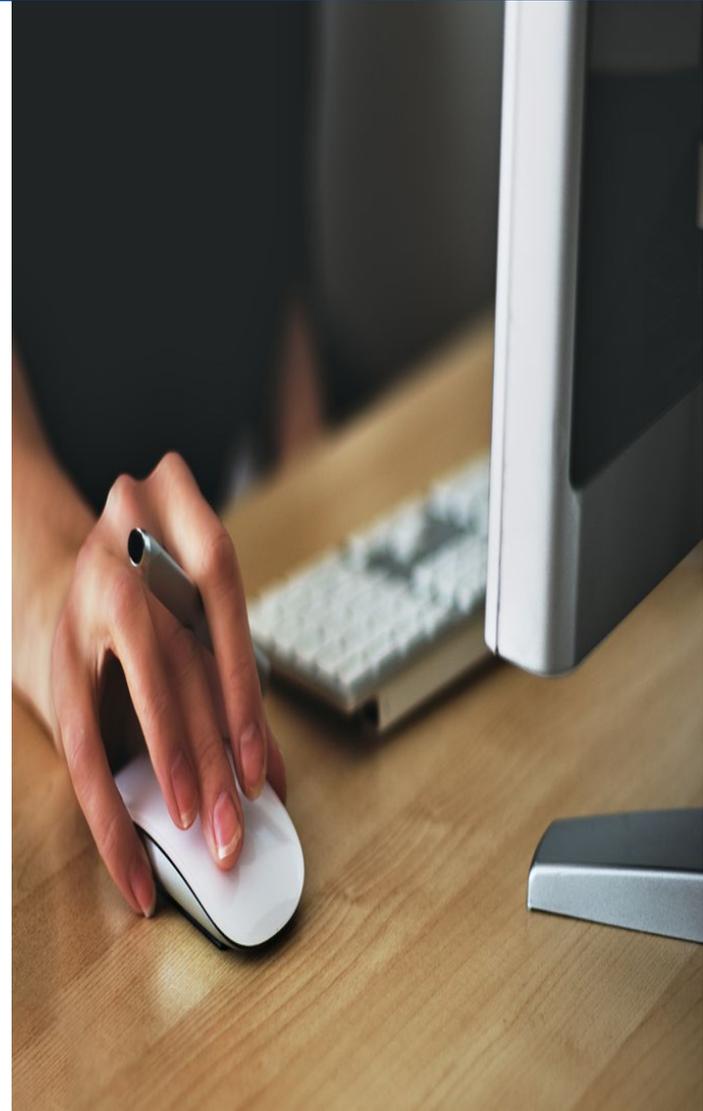
# Complete Optional Training

- To enroll in another curriculum that contains the optional courses perform the following steps:
  - Log in to **CMS Portal**
  - On the **MLMS Profile** page, change the following:
    - ❖ **Assister Type**
    - ❖ **Organization Type**
    - ❖ **Navigator ID (when required)**
    - ❖ **CAC ID (when required)**
  - Select the **Save/Update** button
  - Select **Training Options** Enroll in desired curriculum using the **Actions** link
  - Select **Complete Enrollment**
  - Select **Go to Current Learning**
- The optional courses you did not take as part of your previous curriculum will now appear in Current Learning.

# Troubleshooting

## *Resources*

- Prepare Your Computer System
- Access MLMS
- Complete Required Training
- Complete Optional Training
- **Resources**



# Resources

## *Help Desk Information*

### **MLMS Help Desk**

- Email:  
[MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov)
- Can't print my certificate
- Can't find curriculum
- Training is not launching

### **CMS Enterprise portal Help Desk**

- Email:  
[CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov)
- Phone: 855-267-1515
  - User ID / Password Issues
  - No access to MLMS

- Include the following information:
  - Screenshot of "Check Your System Configuration Page".
  - Screenshot(s) of issue.
  - Third party security software installed.
  - If Flash is installed.

# Resources

## *Quick Reference Guides*

- QRGs – Quick Reference Guides (QRGs) are available on the CMS Training for Navigators, agents, brokers, and other assisters website.



**QUICK REFERENCE GUIDE: PLAN YEAR 20XX**  
Computer Configuration Requirements



**QUICK REFERENCE GUIDE: PLAN YEAR 20XX**  
FFM REGISTRATION AND TRAINING STEPS FOR ASSISTERS

# Resources

## *Frequently Asked Questions*

- FAQ document is available on:
  - CMS Training for Navigators, agents, brokers, and other assisters website.
  - MLMS Landing page and on the pop-up Help Desk window in the MLMS.
- [MLMS FAQ PDF](#)

### Assister Resources

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[Computer Configuration Quick Reference Guide](#)  
[MLMS Check your System](#)  
[Pop-up Guidance](#)  
[AssisterFAQ](#)

### Help

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Certified Application Counselors (CACs) with questions about assister certification training should contact [CACQuestions@CMS.hhs.gov](mailto:CACQuestions@CMS.hhs.gov)

Navigators with questions should contact your CMS project officer.

Need Help? Please click on the Help Desk link at the bottom of the page to send an email to the MLMS help desk  
Monday – Friday: 9:00 AM – 5:00 PM EST

[Assister FAQ: Click Here](#)

# Questions?

