

Launch of 2016 FFM Assister Training

*FFM Assister
Training*

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August 26, 2015*



Agenda

- Objectives
- Certification Requirements
- Summary of Steps
- Demonstration of Process
- System Requirements and Reminders
- Help Desk Support Resources



Objectives

At the end of this webinar you should be able to:

- Understand the training, certification, and recertification process
- Prepare your computer system
- Identify the steps to create a new Enterprise Portal account
- Login to CMS and request access to MLMS
- Locate and enroll into the appropriate Assister curriculum
- Complete training
- Print a training completion certificate
- Locate additional resources



State Certification and Training Requirements in FFM States

- In addition to being aware of the federal training and certification requirements, assisters should be aware that 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.

Certification Requirements for FFM Assisters

- FFM assisters are required to complete CMS training courses and assessments to satisfy federal training requirements (in addition to all other necessary requirements for certification) prior to being certified to provide consumer assistance in a FFM:
 - **All FFM Navigators and in-person assisters** must complete the **14** online required Navigator Curriculum courses and their corresponding **assessments** with an **80% pass rate**. One additional optional course has been added to the curriculum.
 - **All FFM certified application counselors (CACs)** must complete the **6** online CAC Curriculum courses and their corresponding assessments with an **80% pass rate**. All other courses are optional but recommended for CACs to review.

Assisters must fulfill all training and certification requirements by the applicable deadline, and are strongly encouraged to complete these requirements prior to Open Enrollment, which begins November 1, 2015.

Steps to Certificate Completion

1. **Prepare your system**
2. Obtain an Enterprise Portal ID
3. Login to CMS Portal
4. Access MLMS
5. Enroll in Curriculum
6. Complete appropriate training
7. Print certificate



Preparing Your System

1. Allow Pop-up windows for the following URL
 - Open up your browser (Firefox, Chrome, or IE).
 - Firefox instructions: From the toolbar select, **Tools -> Options-> Content -> Exceptions** and then, type **portal.cms.gov** in the **Address of website** field.
 - If your version is different, here's the support link for pop-up blockers
[Chrome Instructions / Firefox Instructions](#)
2. Download latest version of Adobe Flash
 - <https://get.adobe.com/flashplayer/?promoid=JZEFT>
 - Follow the onscreen instructions. (You do not need to select the antivirus software. That is a personal preference.)
1. JavaScript needs to be enabled for successful use of the Enterprise Portal.

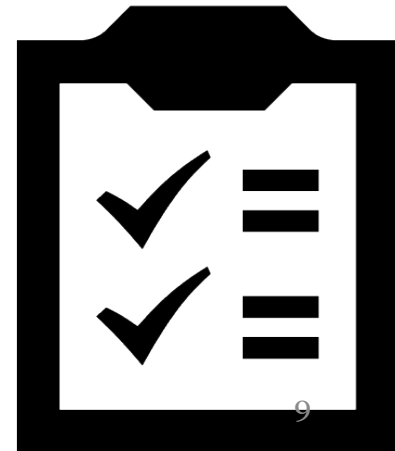
Steps to Certificate Completion

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Creating Enterprise Portal ID Steps

1. Select the **New user Registration** Link
2. Review and accept the terms and conditions and select **Next**
3. Enter all ***required*** profile information, and select **Next**
4. Create a unique user ID and password
5. Select three challenge questions and provide answers
6. Select the **OK** button to complete the procedure



Step 1: New User Registration

The screenshot shows the CMS.gov Enterprise Portal homepage. At the top, the CMS.gov logo is on the left, and navigation links (Home, About CMS, Newsroom, Archive, Help & FAQs, Email, Print) are on the right. Below the logo, it says 'Centers for Medicare & Medicaid Services'. A search bar is also present. Two yellow buttons, 'Health Care Quality Improvement System' and 'Provider Resources', are visible. The main heading is 'Welcome to CMS Enterprise Portal'. Below this, a text block states: 'The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.' A yellow callout bubble with the text 'Select New User Registration.' points to the 'New User Registration' link in the 'CMS Secure Portal' section. This section also includes links for 'Forgot User ID?' and 'Forgot Password?'. A blue button labeled 'Login to CMS Secure Portal' is also present. At the bottom, there is a row of links for various CMS programs (CMS Enterprise Portal, MACBIS, Medicare Shared Savings Program, Physician Value, ASP, Open Payments, QMAT, CPC, Innovation Center, MLMS, CU, PECOS). A footer section mentions 'CMS Provides Health Coverage for 100 Million People...' and includes a link to 'Information for people with Medicare, Medicare open enrollment, and benefits.' A final box on the right offers 'Get E-Mail Alerts Non-Production Environments'.

Welcome to CMS Enterprise Portal

The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.

Select New User Registration.

CMS Secure Portal

To log into the CMS Portal a CMS user account is required.

Login to CMS Secure Portal

[Forgot User ID?](#)
[Forgot Password?](#)
[New User Registration](#)

CMS Enterprise Portal | **MACBIS** | **Medicare Shared Savings Program** | **Physician Value** | **ASP** | **Open Payments** | **QMAT** | **CPC** | **Innovation Center** | **MLMS** | **CU** | **PECOS**

CMS Provides Health Coverage for 100 Million People...

Get E-Mail Alerts Non-Production Environments

The CMS Enterprise Portal is the entry point for CMS assister training. If you do not have a CMS Enterprise Portal account, you must first create one.

Step 2: Accept Terms and Conditions and Select Next

CMS Portal > **New User Registration**

Screen reader mode Off | Accessibility Settings

Terms and Conditions

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

Consent To Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec. 1001 and 1030. We encourage you to read the [HHS Rules of Behavior](#) for more details.

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security of the information you provide. Please read the [CMS Privacy Act Statement](#) which describes how we use the information you provide.

Collection Of Personal Identifiable Information (PII)

"Personal" information is described as data that is unique to an individual. Examples of PII include: name, address, date of birth (DOB), Social Security Number (SSN), and other information that can be used to identify an individual.

CMS is very aware of the privacy concerns around PII data. In fact, we have implemented strict controls to protect your information. We may also use your answers to the challenge questions to verify your identity.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.0015, and I understand that violations of the HHS RoB or information security policies and standards may result in monetary penalties, suspension, or revocation of access to information systems, and/or facilities; and may also result in imprisonment. I understand that exceptions to the HHS RoB must be approved in advance in writing by the OPDIV Chief Information Officer or other designated official. I understand that violation of laws, such as the Privacy Act of 1974, copyright law, 18 USC 2071, which the HHS RoB draw upon, can result in monetary penalties, suspension, or revocation of access to information systems, and/or facilities; and may also result in imprisonment.

☐ I agree to the terms and conditions

[Cancel](#) [Next](#)

Select the checkbox I agree to the terms and conditions.

Select Next when it appears.

Read the Terms and Conditions, select the checkbox, and then click the active Next button.

Step 3: Enter Required Profile Information

CMS Portal > New User Registration

Screen reader mode Off | Accessibility Settings

Your Information Your Information Your Information

Your Information

Enter your legal first name and last name, as it may be required for Identity Verification.

* First Name:

* Last Name:

Middle Name:

Suffix:

Enter your E-mail address, as it will be used for account related communications.

* E-mail Address:

Re-enter your E-mail address.

* Confirm E-mail Address:

Enter your full 9 digit social security number, as it may be required for Identity Verification.

Social Security Number:

Complete the required fields that are identified by the asterisk *

You do not need to complete the **Social Security Number** field.

Step 3: Enter Required Profile Information (cont'd)

Enter your date of birth in MM/DD/YYYY format, as it may be required for Identity Verification.

* Date of Birth:

☒ U.S. Home Address ☐ Foreign address

Enter your current or most recent home address, as it may be required for Identity Verification.

* Home Address Line 1:

Home Address Line 2:

* City:

* State:

* Zip Code:

Zip Code Extension:

Country: USA

Enter your primary phone number, as it may be required for Identity Verification.

* Primary Phone Number:

Finish completing the required fields.

Select Next button.

Cancel

Next

Make sure you complete each field as indicated in the written instructions on the page.

Step 4: Create Unique ID and Password

Step 5: Answer Challenge Questions

Choose User ID And Password

* User ID

* Password

* Confirm Password

Create a
User ID
and
Password.

Select
questions,
provide
answers,
then
select
Next.

Select your Challenge Questions and Answers:

Your challenge questions and answers will be required for password and account management functions.

* Question:1

Please choose one Question

* Question:2

Please choose one Question

* Question:3

Please choose one Question

* Answer:1

* Answer:2


* Answer:3

Cancel

Next

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

Step 6: Select OK


Your Information Choose User ID and Password **Complete Registration**

Account Successfully Created

You have now successfully created an account on the CMS Enterprise Portal. You will receive an e-mail acknowledging your successful account creation, and the e-mail will include the User ID that you selected.

If you are requesting access for a specific role in a system, please log on to the CMS Enterprise Portal using your new User ID and password. Please wait 5 minutes before logging in. Selecting the 'OK' button will direct you to the CMS Portal Landing page.

OK

Select OK
button.

You completed Step 2 in the Steps to Certificate Completion process. You now have an Enterprise Portal ID and password.

Steps to Certificate Completion

1. Prepare your system
2. Obtain an Enterprise Portal ID
- 3. Log in to CMS Portal**
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7. Print certificate



Log in to CMS Portal

1. Select **Login to CMS Secure Portal**
2. Review and accept the terms and conditions by selecting **I Accept**
3. Type your Portal User ID and password and then select **Log In**
4. Select **Request Access Now**
5. Type **FFM** in the Access Catalog field, and then select **Request Access**
6. Select **Assister** role, and then select **Submit**
7. Select **OK**



Step 1: Select Login to CMS Secure Portal

CMS.gov | Enterprise Portal
Centers for Medicare & Medicaid Services

Health Care Quality Improvement System | Provider Resources

CMS Portal > Welcome to CMS Portal

Welcome to CMS Enterprise Portal

The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.

[CMS Enterprise Portal](#) | [MACBIS](#) | [Medicare Shared Savings Program](#) | [Physician Value](#) | [ASP](#) | [Open Payments](#) | [QMAT](#) | [CPC](#) | [Innovation Center](#) | [MLMS](#) | [CU](#) | [PECOS](#)

CMS Secure Portal

To log into the CMS Portal a CMS user account is required.

Login to CMS Secure Portal

[Forgot User ID?](#)
[Forgot Password?](#)
[New User Registration](#)

Get E-Mail Alerts Non-Production Environments

CMS Provides Health Coverage for 100 Million People...

[Information for people with Medicare, Medicare open enrollment, and benefits.](#)

If you already have an Enterprise Portal ID, this is where you start in the process.

Step 2: Accept the Terms and Conditions



The screenshot shows a web interface for the 'Health Care Quality Improvement System'. At the top, there are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. Below these is a blue header bar with the text 'Terms and Conditions'. The main content area is light blue and contains the following text:

OMB No.0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) this computer network, and (4) all devices and storage media attached to this network or to a computer on this network. This information is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.

At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.

At the bottom, there are two buttons: 'I Accept' and 'Decline'. The 'I Accept' button is highlighted with a red rectangular box. A large yellow callout bubble with the text 'Select I Accept.' points to the 'I Accept' button.

The **Terms and Conditions** page appears every time you log in to the Portal. Accept the terms and conditions in order to proceed.

Step 3: Type Your Portal ID and Password, then select Log In

The screenshot shows the login interface of the CMS Enterprise Portal. At the top, a blue banner reads "Welcome to CMS Enterprise Portal". Below this, there are two input fields: "User ID" and "Password", both with empty text boxes. A red rectangular box highlights these two fields. To the right of the input fields, a yellow speech bubble contains the text "Type your User ID and Password". Below the input fields, there are two buttons: a blue "Log In" button and a grey "Cancel" button. A red rectangular box highlights the "Log In" button. To the right of the "Log In" button, another yellow speech bubble contains the text "Select Log In". Below the buttons, there are three links: "[Forgot Password?](#)", "[Forgot User ID?](#)", and "Need an account? Click the link - [New user registration](#)".

Welcome to CMS Enterprise Portal

User ID

Password

[Forgot Password?](#)

[Forgot User ID?](#)

Need an account? Click the link - [New user registration](#)

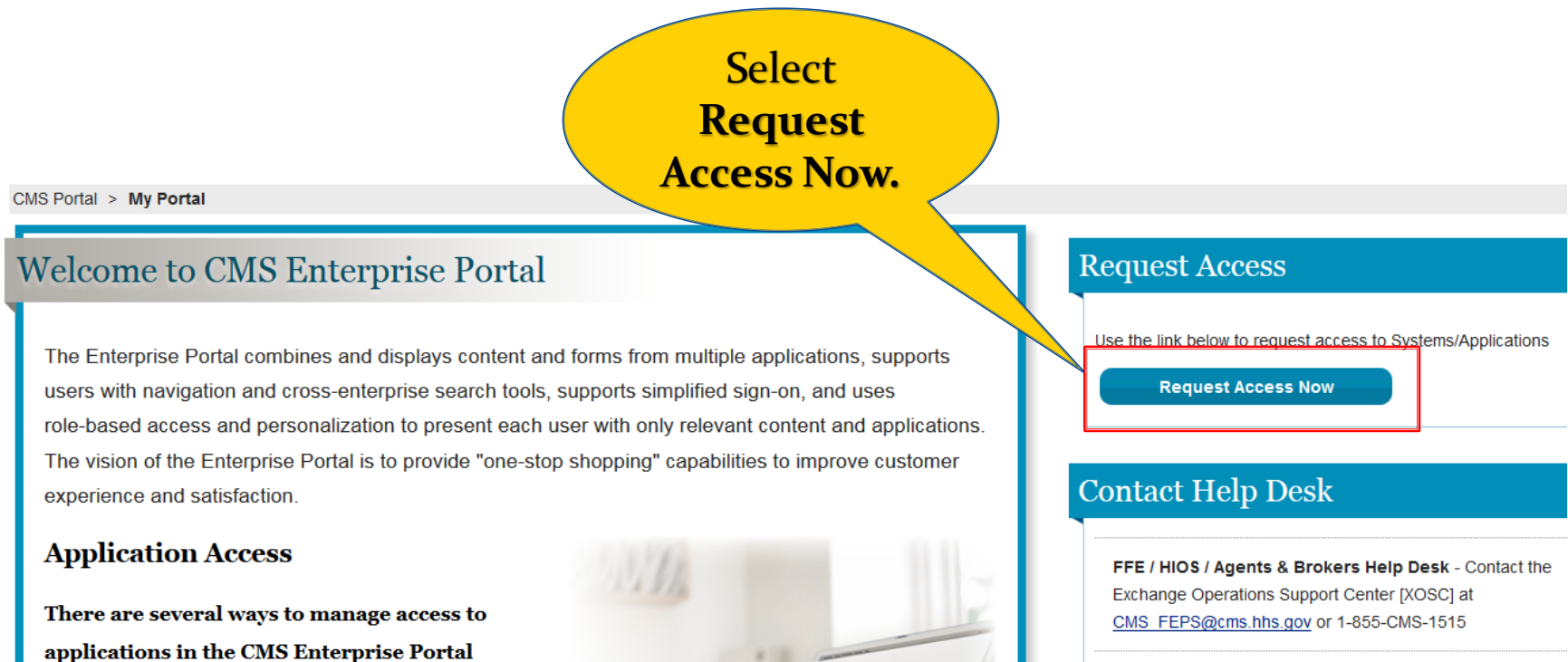
Log In Cancel

Type your User ID and Password

Select Log In

If you need assistance with a forgotten User ID or Password select the appropriate link on this page for further instructions.

Step 4: Select Request Access Now



Select
Request
Access Now.

CMS Portal > My Portal

Welcome to CMS Enterprise Portal

The Enterprise Portal combines and displays content and forms from multiple applications, supports users with navigation and cross-enterprise search tools, supports simplified sign-on, and uses role-based access and personalization to present each user with only relevant content and applications. The vision of the Enterprise Portal is to provide "one-stop shopping" capabilities to improve customer experience and satisfaction.

Application Access

There are several ways to manage access to applications in the CMS Enterprise Portal

Request Access

Use the link below to request access to Systems/Applications

Request Access Now

Contact Help Desk

FFE / HIOS / Agents & Brokers Help Desk - Contact the Exchange Operations Support Center [XOSC] at CMS_FEPS@cms.hhs.gov or 1-855-CMS-1515

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

Step 5: Search for FFM/Training

The screenshot shows the 'My Portal' interface. At the top, a breadcrumb trail reads 'CMS Portal > EIDM user menu page > My Access'. Below this is the 'Access Catalog' section. A search input field contains the letter 'f' and is highlighted with a red box. A yellow speech bubble points to this field with the text 'Type FFM.'. Below the search field, a list of results is displayed. The first result is 'FFM/Training – Agents/Brokers/Assisters', which is highlighted with a red box. A yellow speech bubble points to this result with the text 'Next, select Request Access.'. Below the result title, there is a description: 'Agents and brokers must first request access to "FFM" and then request the Agents and Brokers Access. [More...](#)'. At the bottom of the result card, there is a 'Request Access' button, which is also highlighted with a red box. A yellow speech bubble points to this button with the text 'Next, select Request Access.'. To the right of the search field, there is a 'REQUEST ADMIN ROLE' checkbox and a 'SHOW ALL' button.

My Portal

CMS Portal > EIDM user menu page > My Access

Access Catalog

f

REQUEST ADMIN ROLE SHOW ALL

FFM/Training – Agents/Brokers/Assisters

Agents and brokers must first request access to "FFM" and then request the Agents and Brokers Access. [More...](#)

Help Desk Information
855-287-1515

Request Access

Start typing the application name to begin your search.

Type FFM.

Next, select Request Access.

Several items appear on this page initially. By typing the letter "f" in the **Access Catalog** field, only the items that match the letter are revealed.

Step 6: Select Assister Role and then Submit

CMS Portal > EIDM user menu page > **My Access**

Screen reader mode Off | Accessibility Settings

My Access

[Request New System Access](#)

[View and Manage My Access](#)

Request New System Access

Select a System and then a role to request access.

Depending on your Level of Assurance (LOA) and the role that you request access to satisfy 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.

* System Description:

FFM/Training – Agents/Brokers/Assiste

* Role:

Assisters

Please select a role

Cancel

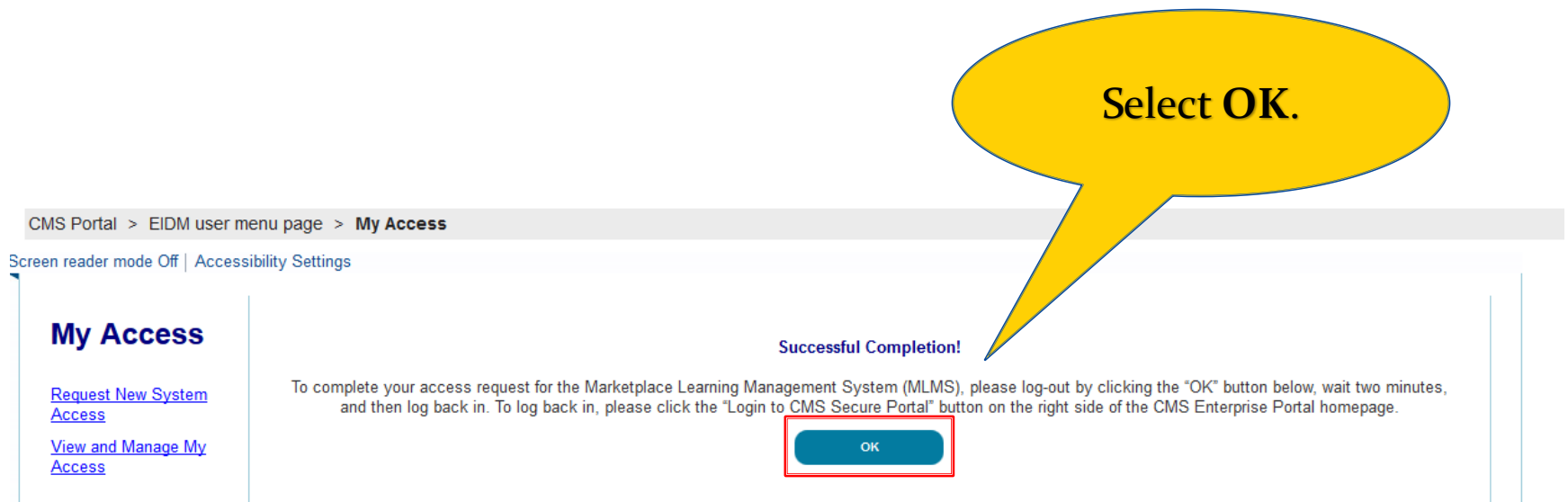
Submit

Select
Assisters
from the list
of roles.

Select
Submit.

Assisters do not need to complete Identity Verification.

Step 7: Select OK



After selecting **OK**, wait **2 minutes** before logging back into the Portal. When you log back in you will see an **MLMS** tab in your Enterprise profile.

Steps to Certificate Completion

1. Prepare your system
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- 4. Access MLMS**
5. Enroll in Curriculum
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7. Print certificate



Accessing the MLMS Steps

1. Select **Login to CMS Secure Portal**
2. Review and accept the terms and conditions by selecting **I Accept**
3. Type your Portal User ID and password and then select **Log In**
4. Select **MLMS > Training**
5. Complete Profile Information fields on Welcome page
6. Select **Next**



Step 1: Select Login to CMS Secure Portal

The screenshot shows the CMS.gov Enterprise Portal. At the top, the CMS.gov logo is followed by 'Enterprise Portal' and 'Centers for Medicare & Medicaid Services'. Navigation links include Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. A search bar is on the right. Below the header, there are buttons for 'Health Care Quality Improvement System' and 'Provider Resources'. The main content area has a 'Welcome to CMS Enterprise Portal' section with a video player showing a doctor. To the right, the 'CMS Secure Portal' section contains a 'Login to CMS Secure Portal' button, which is highlighted by a yellow callout bubble. Below the login button are links for 'Forgot User ID?', 'Forgot Password?', and 'New User Registration'. At the bottom, there is a row of buttons for various CMS programs: CMS Enterprise Portal, PECOS, MACBIS, Medicare Shared Savings Program, Physician Value, ASP, Open Payments, QMAT, CPC, Innovation Center, MLMS, and CU. A footer section includes the text 'CMS Provides Health Coverage for 100 Million People...' and a link to 'Information for people with Medicare, Medicare open enrollment, and benefits.'.

Select Login to CMS Secure Portal

Welcome to CMS Enterprise Portal

The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.

CMS Secure Portal

To log into the CMS Portal a CMS user account is required.

Login to CMS Secure Portal

[Forgot User ID?](#)
[Forgot Password?](#)
[New User Registration](#)

CMS Enterprise Portal | MACBIS | Medicare Shared Savings Program | Physician Value | ASP | Open Payments | QMAT | CPC | Innovation Center | MLMS | CU | PECOS

CMS Provides Health Coverage for 100 Million People...

Information for people with Medicare, Medicare open enrollment, and benefits.

Get E-Mail Alerts Non-Production Environments

If you log back in too soon after selecting FFM Training, your Portal page will not show the MLMS tab. Be sure and wait two minutes before logging back in.

Step 2: Accept the Terms and Conditions

The screenshot shows a web interface for the 'Health Care Quality Improvement System'. At the top, there are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. Below these is a blue header bar with the text 'Terms and Conditions'. The main content area is light blue and contains the following text:

OMB No.0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

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At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.

At the bottom, there are two buttons: 'I Accept' and 'Decline'. The 'I Accept' button is highlighted with a red rectangular box. A large yellow callout bubble with the text 'Select I Accept.' points to the 'I Accept' button.

The **Terms and Conditions** page appears every time you log in to the Portal. Accept the terms and conditions in order to proceed.

Step 3: Type Your Portal ID and Password, then select Log In

The screenshot shows the login interface of the CMS Enterprise Portal. At the top, a blue banner reads "Welcome to CMS Enterprise Portal". Below this, there is a login form with two input fields: "User ID" and "Password". A red rectangular box highlights both input fields. To the right of the form, a yellow speech bubble contains the text "Type your User ID and Password". Below the input fields, there are two buttons: "Log In" and "Cancel". A red rectangular box highlights the "Log In" button. To the right of the buttons, another yellow speech bubble contains the text "Select Log In". Below the buttons, there are three links: "[Forgot Password?](#)", "[Forgot User ID?](#)", and "Need an account? Click the link - [New user registration](#)".

Welcome to CMS Enterprise Portal

User ID

Password

Log In **Cancel**

[Forgot Password?](#)
[Forgot User ID?](#)
Need an account? Click the link - [New user registration](#)

Type the required information and select **Log In**.

Step 4: Select MLMS > Training



Welcome to CMS Enterprise Portal

The Enterprise Portal combines and displays content and forms from multiple applications, supports users with navigation and cross-enterprise search tools, supports simplified sign-on, and uses role-based access and personalization to present each user with only relevant content and applications. The vision of the Enterprise Portal is to provide "one-stop shopping" capabilities to improve customer experience and satisfaction.

After requesting access to the FFM, the **MLMS** tab appears on your **Portal** page.

Step 5: Complete Profile Fields

Welcome to the MLMS

Prior to navigation to the MLMS homepage, you are required to enter/validate your assister profile information.

New users: Please enter your assister information and click the "Save/Update" button at the bottom of the screen to be re-directed to the MLMS Homepage.

Existing users: You may update your profile and click the "Save/Update" button or click the "Next" button if your information is valid.

Note: Navigators/Federal IPA users, your organization information will be obtained from HIOS and does not require manual entry.

Email:

Assister Type: *

Training Language Selection: *

How Many Years Have You Been an Assister: *

When Did You Last Complete Federal Assister Training: *

Organization Type: *

Organization Name:

Organization Street Address:

Organization City:

Organization State:

Organization Zip Code:

Organization Phone Number:

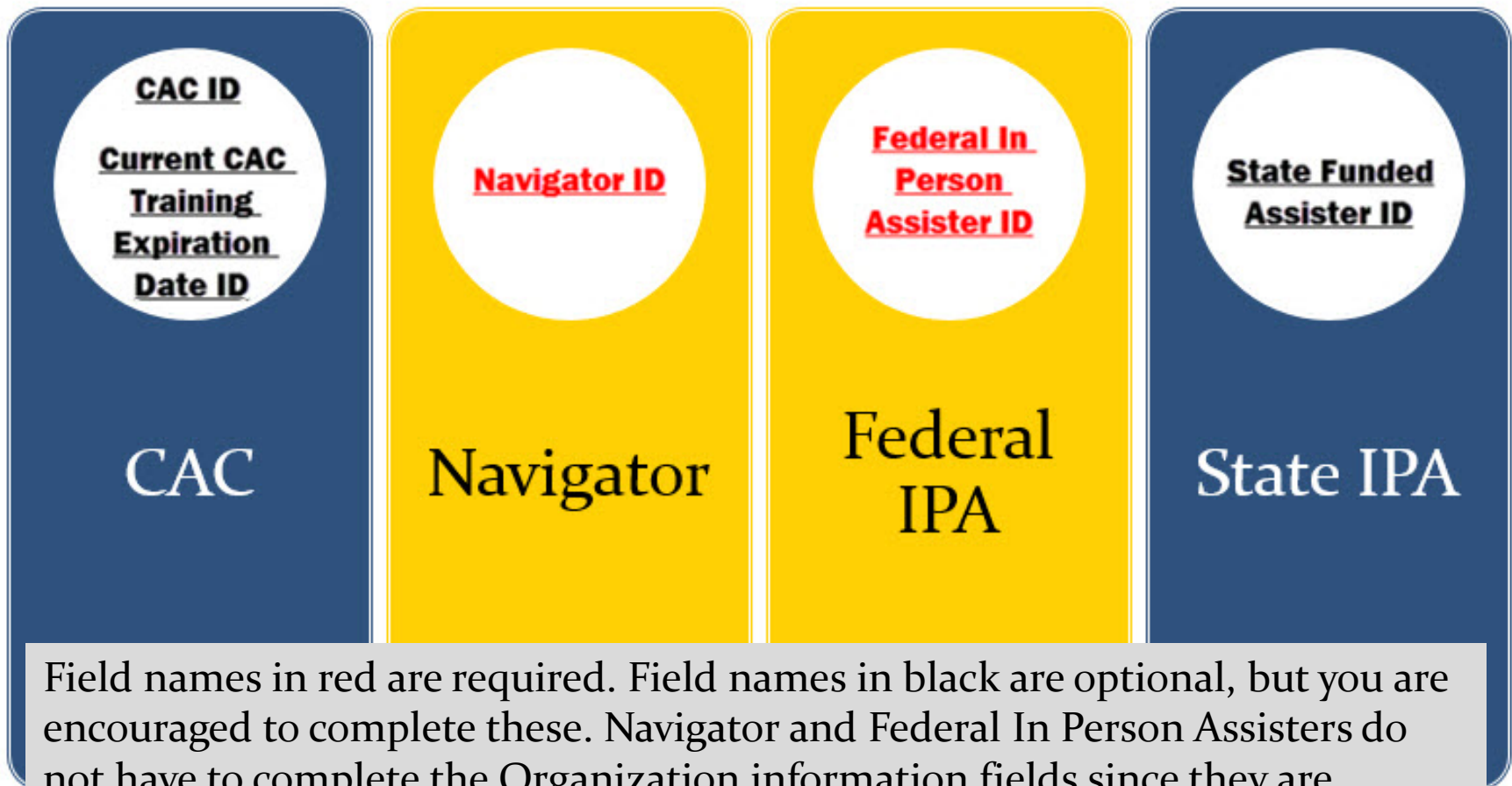
Complete the necessary fields based on your Assister type

Select **Save/Update** when complete

Save/Update

The field names in red with an asterisk are required by all Assisters. Additional fields appear or disappear after you select the **Assister Type**.

Additional Fields for Assister Types



Field names in red are required. Field names in black are optional, but you are encouraged to complete these. Navigator and Federal In Person Assisters do not have to complete the Organization information fields since they are obtained from HIOS.

MLMS Welcome Page

- The Welcome page appears every time you access the MLMS. Update the fields when necessary and select **Save/Update**, or select the **Next** button if none are needed. Advancing from this page displays the MLMS Home page.

 Portal Help & FAQs

 Print

Welcome to the MLMS

Prior to navigation to the MLMS homepage, you are required to enter/validate your assister profile information.

New users: Please enter your assister information and click the "Save/Update" button at the bottom of the screen to be re-directed to the MLMS Homepage.

Existing users: You may update your profile and click the "Save/Update" button or click the "Next" button if your information is valid.

Note: Navigators/Federal IPA users, your organization information will be obtained from HIOS and does not require manual entry.

Email:

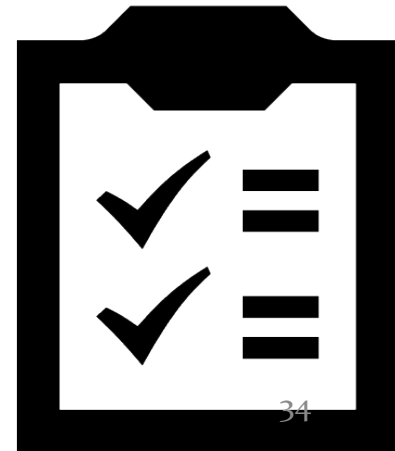
Assister Type: *

-Select One-



Steps to Certificate Completion

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6. Complete appropriate training
7. Print certificate.



Enroll in Curriculum Steps

1. From Training Options, select the **Actions** link, and then **Enroll**
2. Select **Complete Enrollment**
3. Select **Go To Current Learning**
4. Select **Launch**



MLMS Home Page

- This is the MLMS Home page. To return to this page at anytime, select **Home** on the left navigation bar.

The screenshot displays the MLMS Home Page. At the top, a blue navigation bar contains links for 'Portal Help & FAQs', a 'Print' icon, a 'Log Out' button, and a welcome message 'Welcome CACTesterDKJ Johnson'. Below this, a header section includes the 'Health Insurance Marketplace' logo, a notification icon with the number '0', and the user's name 'CACTesterDKJ Johnson' next to a profile icon. A 'Personalize' link is located in the top right corner. The main content area is divided into several sections: a left navigation bar with 'Home' (highlighted with a red box) and 'Learning'; an 'Assister Announcement' section with the text '"Need Help? See the Help Desk link at the bottom of the page.'; an 'Assister Resources' section with a link to 'CMS Portal Assister'; a 'Current Learning' section with the message 'No items found.'; a 'Curriculum Status' section with the message 'No items found.' and a link to 'All Curriculum'; a 'Training Options' section containing a table of recommendations; and a 'Disclaimer' section with a paragraph of legal text.

Portal Help & FAQs Print Log Out Welcome CACTesterDKJ Johnson

Health Insurance Marketplace 0 CACTesterDKJ Johnson Personalize

Home Learning

Assister Announcement

"Need Help? See the Help Desk link at the bottom of the page.

Assister Resources

CMS Portal Assister

Current Learning

No items found.

Curriculum Status

No items found.

All Curriculum

Training Options

Recommendation	Recommendation Type	Sources	Recommended On	Actions
CAC - Real	Curriculum	(1)CAC	07/20/2015	Actions
CAC - Mock	Curriculum	(1)CAC	07/20/2015	Actions

View All...

Disclaimer

The Centers for Medicare & Medicaid Services (CMS) employees, agents, and staff make no representation, warranty, or guarantee that this compilation of Medicare information is error-free and will bear no responsibility or liability for the results or consequences of the use of this guide. This publication is a general summary that explains certain aspects of the Medicare Program, but is not a legal document. The official Medicare Program provisions are contained in the relevant laws, regulations, and rulings.

Step 1: Select Actions and then Enroll

Health Insurance Marketplace

CACTesterDKJ Johnson

Assister Resources

Curriculum Status

Name	Version	Status
CAC - Mock (FINAL)	FINAL	Assigned

Disclaimer

Current Learning

Name	Status	Action
CAC - Mock (FINAL)	Assigned	Enroll

Training Options

Recommendation	Recommendation Type	Sources	Recommended On	Action
Assisters_UAT_Curriculum (FINAL)	Curriculum	(1)CAC	07/30/2015	Action
CAC - Real (FINAL)	Curriculum	(1)CAC	07/30/2015	Actions

Hover mouse over **Actions** link, and then select **Training**.

Actions

- View Detail
- Enroll

Enroll

Look in the **Training Options** portlet for the curriculum in which to enroll.

Step 2: Select Complete Enrollment

Register for CAC - Real (FINAL)

To register for [CAC - Real \(FINAL\)](#), verify the path, select modules and learning elements within the module that you would like to complete. [See complete registration guidelines.](#)

Complete Enrollment

Path: CAC (FINAL)

Note: Actual seat availability might vary at the time of registration, due to existing registration.

CAC - (FINAL) (Complete 6 of 6 Required) Required

<input checked="" type="checkbox"/>		001 Training Overview (Course : 00001207, Version FINAL)			
<input checked="" type="radio"/>		Offering ID: 00001306 Language: English	Offered As: Web Based Training	Suggested	Change Offering
<input checked="" type="checkbox"/>		005 Marketplace Eligibility and Application Assistance (Course : 00001211, Version FINAL)			
<input checked="" type="radio"/>		Offering ID: 00001314 Language: English	Offered As: Web Based Training	Suggested	Change Offering
<input checked="" type="checkbox"/>		006 Marketplace Plan Section Enrollment and Appeals (Course : 00001212, Version FINAL)			

The curriculum is displayed. Some of the modules include both a course and an assessment that needs to be completed.

Step 3: Select Go To Current Learning

Order Items

Title	Learners	Delivery Type	Status	Actions
<input checked="" type="checkbox"/> CAC - Real (FINAL)	CACTesterDKJ Johnson			
..... 001 Training Overview		Web Based Training	Confirmed	Notes
..... 005 Marketplace Eligibility and Application Assistance		Web Based Training	Confirmed	Notes
..... 006 Marketplace Plan Section Enrollment and Appeals		Web Based Training	Confirmed	Notes
..... 007 Marketplace Affordability and Assistance Programs		Web Based Training	Confirmed	Notes
..... 012 Marketplace Exemptions Assistance		Web Based Training	Confirmed	Notes
..... 013 Privacy, Security, and Fraud Prevention		Web Based Training	Confirmed	Notes
..... 008 SHOP Marketplace Assistance		Web Based Training	Confirmed	Notes

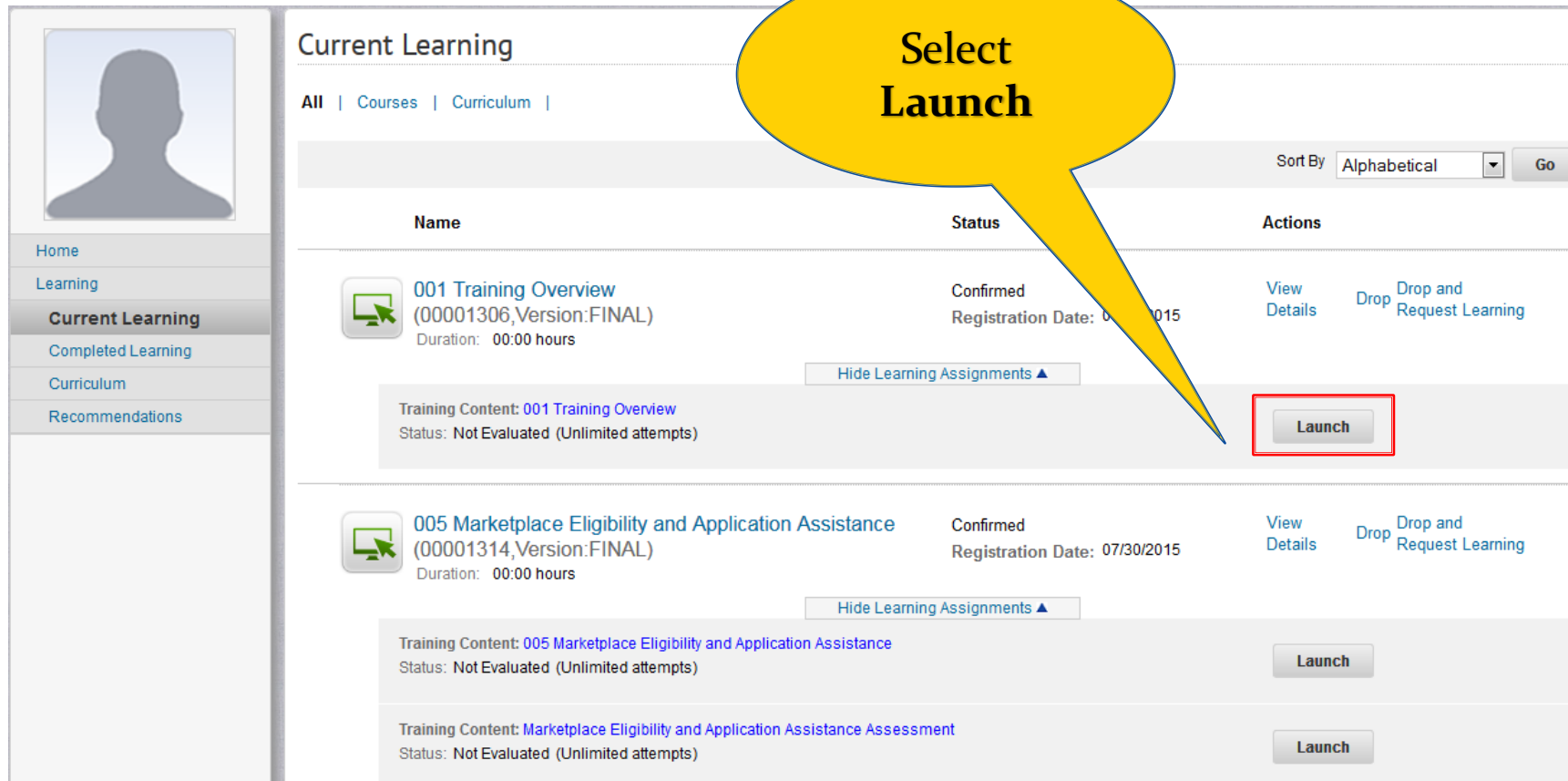
**Select Go to
Current
Learning**

Go to Curriculum Details



Go to Current Learning

Once you select, **Go to Current Learning**, the **Current Learning** page is displayed.

Step 4: Select Launch



The screenshot shows a user interface for 'Current Learning'. On the left is a sidebar with navigation links: Home, Learning, **Current Learning**, Completed Learning, Curriculum, and Recommendations. The main area is titled 'Current Learning' and includes tabs for 'All', 'Courses', and 'Curriculum'. A 'Sort By' dropdown is set to 'Alphabetical' with a 'Go' button. Below this is a table with columns 'Name', 'Status', and 'Actions'. The table lists two training items: '001 Training Overview' and '005 Marketplace Eligibility and Application Assistance'. Each item has a 'Launch' button in the 'Actions' column. A yellow callout bubble with the text 'Select Launch' points to the 'Launch' button for the first item. The 'Launch' button is highlighted with a red rectangle.

Name	Status	Actions
 001 Training Overview (00001306,Version:FINAL) Duration: 00:00 hours	Confirmed Registration Date: 07/30/2015	View Details Drop Drop and Request Learning
Training Content: 001 Training Overview Status: Not Evaluated (Unlimited attempts)		Launch
 005 Marketplace Eligibility and Application Assistance (00001314,Version:FINAL) Duration: 00:00 hours	Confirmed Registration Date: 07/30/2015	View Details Drop Drop and Request Learning
Training Content: 005 Marketplace Eligibility and Application Assistance Status: Not Evaluated (Unlimited attempts)		Launch
Training Content: Marketplace Eligibility and Application Assistance Assessment Status: Not Evaluated (Unlimited attempts)		Launch

To begin a course or assessment, select the **Launch** button. A new window opens on top of this page displaying the training course or assessment.

Steps to Certificate Completion

1. Prepare your system
2. Obtain an Enterprise Portal ID
3. Login to CMS Portal
4. Access MLMS
5. Enroll in Curriculum
- 6. Complete appropriate training**
7. Print certificate.

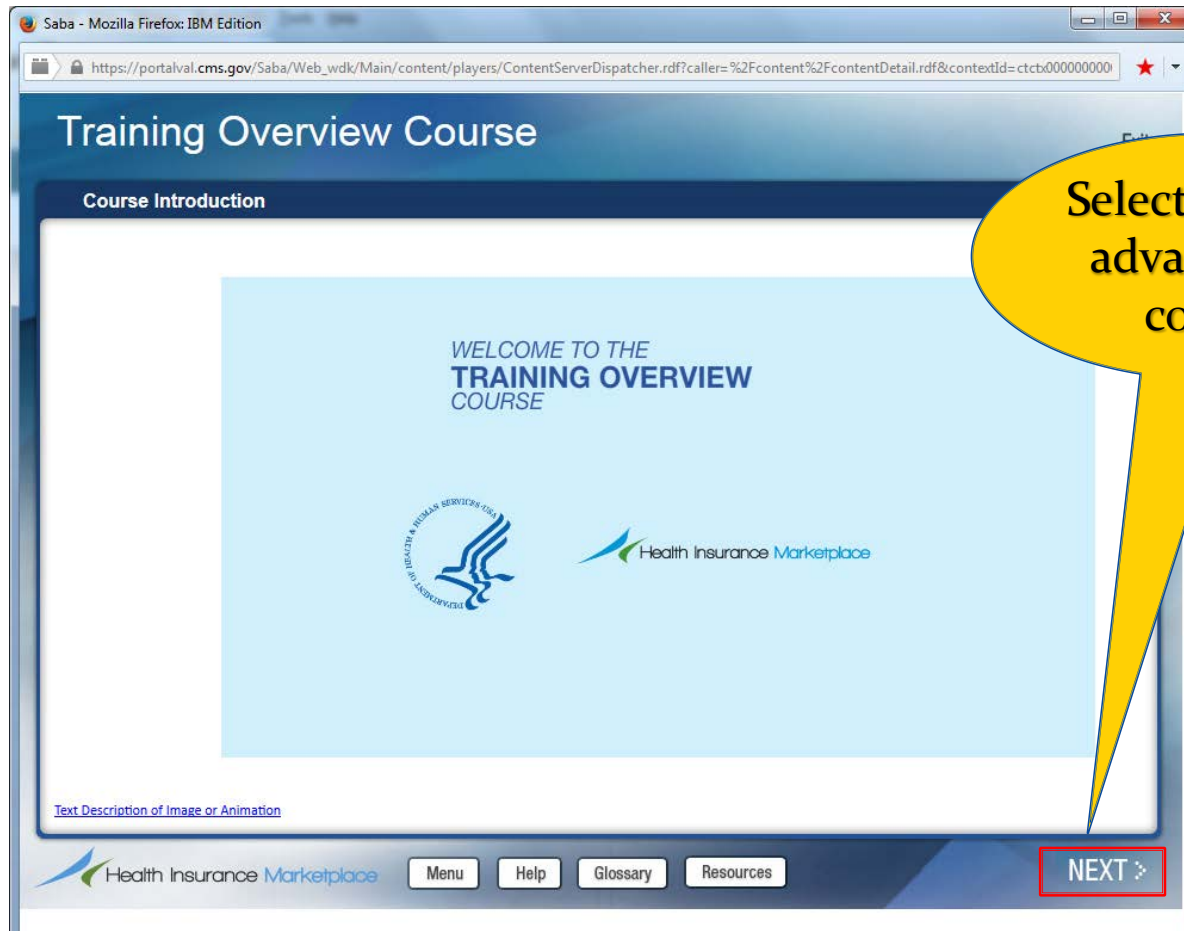


Complete Appropriate Training Steps

1. Select **Next** to advance through the training
2. Select **Exit** button on training window when finished.
3. Select **OK** to complete exit or window closes automatically.
4. Review Completion Status on the Learning Assignments tab of the **Current Learning** page to ensure it states **Successful**



Step 1: Select Next



This is the Training course window. You may use the **Back** button on the course window to return to a previous page in the course.

Step 1: Select Next (cont'd)

Training Overview Course Exit


Providing Fair, Accurate and Impartial Information Page 2 of 11

What is Fair, Accurate, and Impartial Information?

You must always provide fair, accurate, and impartial information. This means that if you have a **non-disqualifying relationship** with a health insurance company offering a particular health plan, you must generally disclose that relationship to consumers. This also means that you should provide help to consumers that focuses only on their best interests and not your own interests or the interests of any health insurance company with which you have a relationship.

Providing fair, accurate, and impartial information includes providing information that assists consumers with submitting the eligibility application; clarifying the distinctions among health coverage options, including QHPs; and helping consumers make informed decisions during the health coverage selection process. As a best practice, you should help consumers choose health coverage that best meets their needs, including but not limited to the following:

- Their ability to afford paying for health coverage
- Their health care needs, such as coverage of treatments for any health conditions
- Their desire to keep a certain doctor or see doctors in a certain location
- Their families' health coverage needs, if applicable



Select every link on the page to activate the Next button.

Health Insurance Marketplace Menu Help Glossary Resources < BACK

The Next button does not appear until all links, Knowledge Checks, Tool tips and Key tips, etc. on a page have been selected.

Step 2: Select Exit

The screenshot displays a web-based training interface. At the top, the title 'Training Overview Course' is shown in a blue header. In the top right corner, there is a red-bordered button labeled 'Exit'. Below the header, a dark blue bar contains the text 'Providing Fair, Accurate and Impartial Information' on the left and 'Page 11 of 11' on the right. The main content area has a light gray background with a compass image at the bottom. It features a section titled 'Key Points' with three bullet points: 'Assisters are responsible for providing fair, accurate, and impartial information.', 'Assisters must tell consumers about all of the qualified health plan options and insurance programs for which they are eligible, so that they can choose coverage that meets their needs.', and 'Assisters are responsible for providing assistance that is accessible to all types of consumers, necessary, referring consumers to resources that can best meet their needs.' Below this, a message states 'You've successfully completed this course.' followed by 'Click **EXIT** to leave the course.' At the bottom of the interface, there is a navigation bar with the 'Health Insurance Marketplace' logo, and buttons for 'Menu', 'Help', 'Glossary', 'Resources', and a 'BACK' button with a left-pointing arrow.

Training Overview Course

Exit

Providing Fair, Accurate and Impartial Information Page 11 of 11

Key Points

- Assisters are responsible for providing fair, accurate, and impartial information.
- Assisters must tell consumers about all of the qualified health plan options and insurance programs for which they are eligible, so that they can choose coverage that meets their needs.
- Assisters are responsible for providing assistance that is accessible to all types of consumers, necessary, referring consumers to resources that can best meet their needs.

You've successfully completed this course.

Click **EXIT** to leave the course.

Health Insurance Marketplace Menu Help Glossary Resources BACK

Select Exit to
leave the
course

When you complete the training or if you need to leave the training before completing, select the **Exit** button on the Training course window.

Step 3: Select OK



If you haven't completed the course, the MLMS marks the spot in the course where you left off and presents this page to you upon restarting the training.

Step 4: Check Completion Status

The screenshot displays the '001 Training Overview (00001306, FINAL)' page. On the left is a sidebar with navigation links: Home, Learning, Current Learning (highlighted), Completed Learning, Curriculum, and Recommendations. The main content area shows training details: Available From (07/24/2015), Language (English), and Description (Web Based Training). Below this is a tabbed interface with 'Main', 'Learning Assignments' (active), and 'Associated Learning'. A summary bar indicates 'Completion Status: Successful' and 'Score: 0'. The 'Learning Assignments' table lists the training module with a completion status of 'Successful' on '07/30/2015'. A yellow callout bubble points to the 'Successful' status, and a red box highlights the 'Completion Status' and 'Completed On' columns for the listed assignment.

001 Training Overview (00001306, FINAL)

Available From 07/24/2015
Language English
Description Web Based Training

Home
Learning
Current Learning
Completed Learning
Curriculum
Recommendations

Main Learning Assignments Associated Learning

Completion Status Successful Score 0

Learning Assignments

Module	Assignment Type	Requirement	Details	Completion Status	Completed On	Actions
001 Training Overview	Training Content	Required	Attempts Allowed: Unlimited	Successful	07/30/2015	Launch more actions

Modify Table

The **Current Learning** page **Learning Assignments** tab shows **Successful** completion of the training as well as the date the training was completed.

Steps to Certificate Completion

1. Prepare your system
2. Obtain an Enterprise Portal ID
3. Login to CMS Portal
4. Access MLMS
5. Enroll in Curriculum
6. Complete appropriate training
7. **Print certificate**



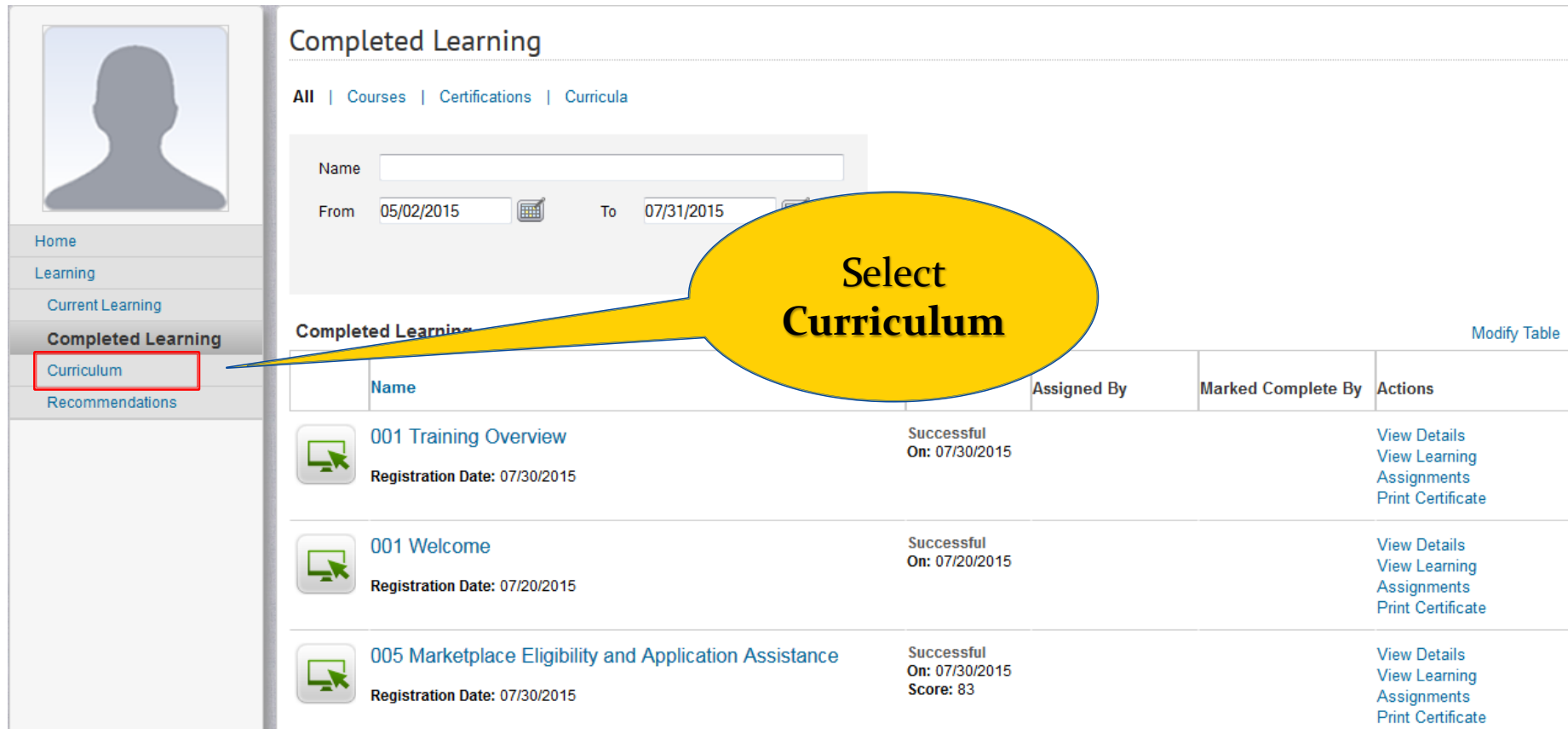
Print Certificate Steps

1. Select **Curriculum** from left navigation bar
2. Hover your mouse over the **Actions** link and then select **Print Certificate**
3. Select **Print**
4. Follow your system's print window instructions to complete printing.




Note: You may need to select the Activate Adobe Acrobat link on your screen in order to see and print the certificate.



Step 1: Select Curriculum



The screenshot shows a user interface for 'Completed Learning'. On the left is a sidebar with a user profile icon and navigation links: Home, Learning, Current Learning, Completed Learning (highlighted), Curriculum (highlighted with a red box and a yellow callout bubble), and Recommendations. The main content area is titled 'Completed Learning' and includes tabs for All, Courses, Certifications, and Curricula. Below the tabs are search filters for Name, From (05/02/2015), and To (07/31/2015). A table titled 'Completed Learning' displays a list of completed items. A yellow callout bubble with the text 'Select Curriculum' points to the 'Curriculum' link in the sidebar.

Name	Assigned By	Marked Complete By	Actions
 001 Training Overview Registration Date: 07/30/2015	Successful On: 07/30/2015		View Details View Learning Assignments Print Certificate
 001 Welcome Registration Date: 07/20/2015	Successful On: 07/20/2015		View Details View Learning Assignments Print Certificate
 005 Marketplace Eligibility and Application Assistance Registration Date: 07/30/2015	Successful On: 07/30/2015 Score: 83		View Details View Learning Assignments Print Certificate

After completing all training and assessments for your Curriculum, select **Curriculum** on the left navigation bar.

Step 2: Select Print Certificate

To print your certificate, please click on the “Actions” link (below and to the right), and then click “Print Certificate”.

View the curriculum that have been assigned to you. For suggestions of additional curricula you can complete, [recommendations](#).

Internal External

Name Show Required Curriculum Only ☒

[Configure](#) | [Save Search Query](#)

Internal Curriculum
Showing 3 out of 3 results

Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Actions
CAC - Real (FINAL)	MOCK	<u>CAC - Mock - 100% Completed</u>	N/A	Acquired	CACTesterDKJ Johnson		Actions

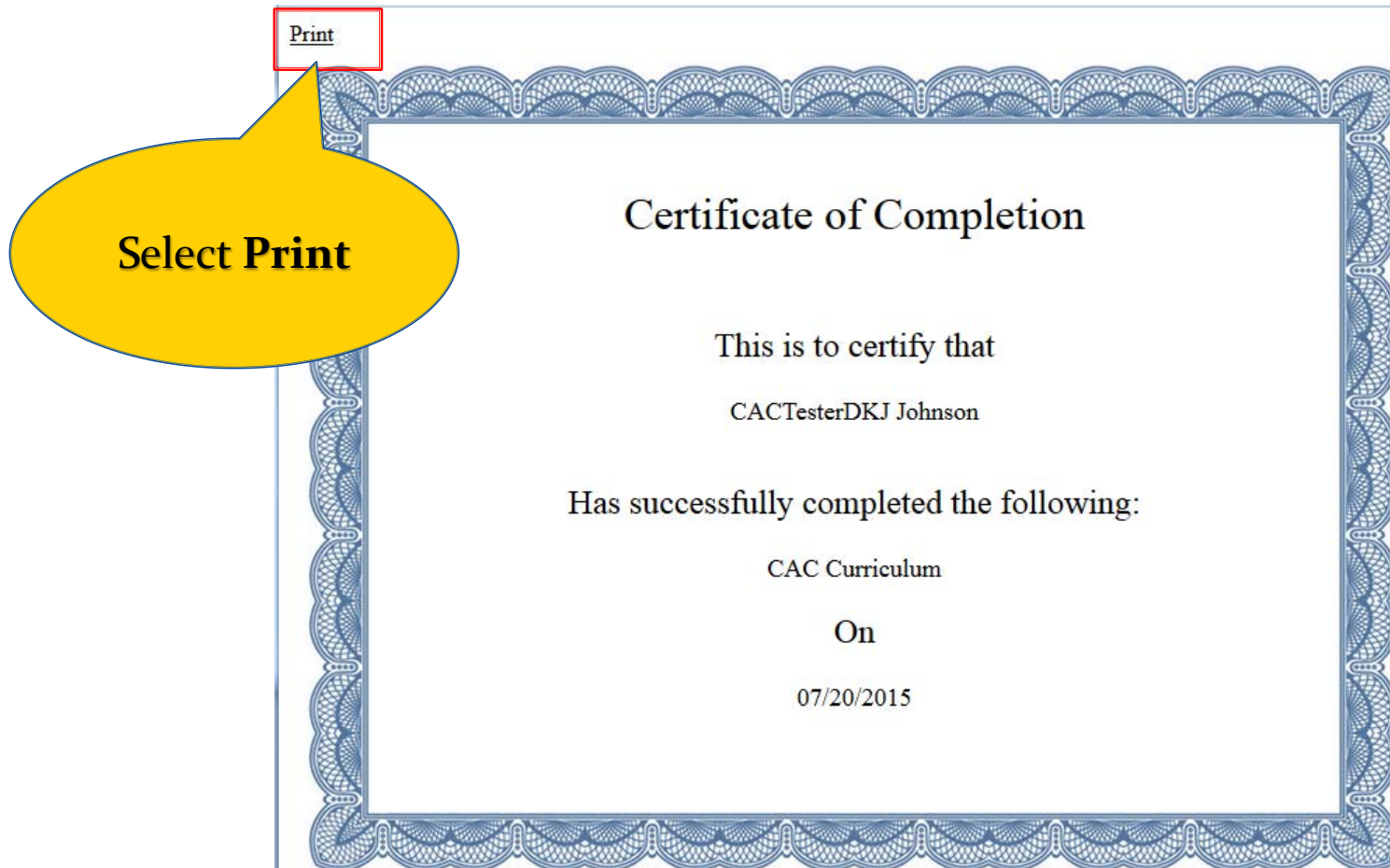
Actions

- View Curriculum History
- View Progress for All Paths
- View Acquisition History
- Print Certificate**

Hover mouse on Actions, and then Select Print Certificate

You must complete the entire curriculum in order for the **Print Certificate** option to appear on the curriculum **Actions** list.

Step 5: Print Certificate



This is an example of the CAC Certificate of Completion. Select **Print** and follow your print window instructions to print the certificate to your printer.

Step 5: Print Certificate



Certified Marketplace Navigator

John Smith
Fed org name 0430 and KS
4302015

The United States Department of Health and Human Services recognizes
John Smith of Fed org name 0430 as a
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.

04/06/2015 - 09/15/2015

Performance Period (effective/expiration date)


Marilyn B. Tavenner, Administrator



Health Insurance Marketplace

This is an example of the certificate that appears when a Navigator or Federal IPA completes the Navigator curriculum.

Don't Print Course Certificates



- Home
- Learning
- Current Learning
- Completed Learning**
- Curriculum
- Recommendations




Completed Learning

[All](#) | [Courses](#) | [Certifications](#) | [Curricula](#)

From To

Completed Learning

[Modify Table](#)

	Name	Status	Assigned By	Marked Complete By	Actions
	001 Training Overview Registration Date: 07/30/2015	Successful On: 07/30/2015			View Details View Learning Assignments Print Certificate
	001 Welcome Registration Date: 07/20/2015	Successful On: 07/20/2015			View Details View Learning Assignments Print Certificate
	005 Marketplace Eligibility and Application Assistance Registration Date: 07/30/2015	Successful On: 07/30/2015 Score: 83		Print	



If you see the Certificate of Achievement, it means you selected **Print Certificate** from a training course on the **Completed Learning** page.

Launching a Completed Course

1. From the Home page of the MLMS, select **Learning** from left navigation bar
2. From the left navigation bar, select **Completed Learning**
3. Locate the course that you want to review and select the **View Learning Assignments** link in the right most column.
4. Select **Launch** and then **Cancel**.



Step 1: Select Learning

The screenshot shows the Health Insurance Marketplace portal interface. At the top, there is a teal header bar with links for 'Portal Help & FAQs', 'Print', and a user profile icon labeled 'Content TestingTen'. Below the header, the main content area is divided into several sections. On the left, a vertical navigation bar contains a user profile icon and two menu items: 'Home' and 'Learning'. The 'Learning' item is highlighted with a red rectangular box. A yellow callout bubble with a blue border points from this box to the right, containing the text 'Select Learning from left navigation bar'. The main content area includes sections for 'Assister Announcement' (with a message about the Help Desk), 'Current Learning' (a table of courses), 'Assister Resources', 'Curriculum Status' (a table of curriculum items), and a 'Disclaimer' section at the bottom right.

Portal Help & FAQs Print

Health Insurance Marketplace

Content TestingTen

Assister Announcement

"Need Help? See the Help Desk link at the bottom of the page."

Assister Resources

Curriculum Status

Name	Version	Status
CAC - Real (FINAL)	FINAL	In Progress

Disclaimer

Home

Learning

Current Learning


Name	Status	Action
005 Marketplace Eligibility and App...		
006 Marketplace Affordability		
007 Marketplace Enrollment and Appeal...		

Select Learning from left navigation bar

If you want to review training content that you've already completed, you will need to navigate to the **Completed Learning** page to find the course.

Step 2: Select Completed Learning

The screenshot shows the Health Insurance Marketplace Learning page. At the top, there is a blue header with 'Portal Help & FAQs' and 'Print' links. Below this, the 'Health Insurance Marketplace' logo is visible. On the right, the user is identified as 'Content TestingTen'. The main content area is titled 'Current Learning' and includes tabs for 'All', 'Courses', and 'Curriculum'. A yellow callout bubble points to the 'Completed Learning' link in the left navigation bar. The main content area displays a table of learning assignments.

	Status
 005 Marketplace Eligibility and Application Assistance (00001314, Version: FINAL) Duration: 00:00 hours	Confirmed Registration
Hide Learning Assignments ▲	
Training Content: Marketplace Eligibility and Application Assistance Status: Not Evaluated (Unlimited attempts)	
Training Content: Marketplace Eligibility and Application Assistance Assessment Status: Not Evaluated (Unlimited attempts)	

By default, the **Current Learning** page is displayed when you select **Learning**. Note that the **001 Training Overview** course is not displayed since it's already been completed.

Step 3: Select View Learning Assignments

The screenshot shows the 'Completed Learning' section of the Health Insurance Marketplace. A yellow speech bubble with the text 'Select View Learning Assignments' points to the 'View Learning Assignments' link in the Actions column of the table.

Completed Learning

All | Courses | Certifications | Curricula

Name:

From: 05/14/2015 To: 08/12/2015

Search

Completed Learning Modify Table

	Name	Status	Assigned By	Marked Complete	Actions
	001 Training Overview Registration Date: 08/12/2015	Successful On: 08/12/2015			View Details View Learning Assignments Print Certificate

Navigate to the course that you want to review. You may need to scroll or select the **Next** button at the bottom of the page to find a course.

Step 4: Select Launch and Cancel

The screenshot shows a training interface with a sidebar on the left containing links: Home, Learning, Current Learning, **Completed Learning**, Curriculum, and Recommendations. The main area displays a 'Learning Assignments' table with columns: Module, Completion Status, Completed On, and Actions. A modal dialog box is open, asking 'You have previously been in this lesson. Would you like to return to the last visited location in the lesson?' with 'OK' and 'Cancel' buttons. A yellow callout bubble points to the 'Launch' button in the 'Actions' column of the table, labeled 'Select Launch'. Another yellow callout bubble points to the 'Cancel' button in the dialog box, labeled 'Select Cancel'.

You have previously been in this lesson.
Would you like to return to the last visited location in the lesson?

OK Cancel

Learning Assignments

Module	Completion Status	Completed On	Actions
Training Overview	Successful	08/12/2015	Launch more actions

Cancel

When you select **Launch**, the training content window appears. The bookmarking message also appears. Select **Cancel** to start the content from the beginning.

Launch of 2016 FFM Assister Training

*System Requirements
and Reminders*

*Jabaar Gray
August 26, 2015*



Topics

- Browser Types
- Prepare your system
- Home Computer / Public Computer
- Portal Timeout
- Print Last Page for Verification
- Contact the Help Desk for assistance
- “Remember to” Summary
- Do’s and Don’ts

Browsers

- Browsers – Assister training is currently not supported by Internet Explorer. Please do not use that browser at this time. We're working to resolve this issue.
- USE one of the following Browsers:



Preparing Your System

1. Allow Pop-up windows for the following URL
 - Open up your browser (Firefox or Chrome).
 - Firefox instructions: From the toolbar select, **Tools -> Options-> Content -> Exceptions** and then, type **portal.cms.gov** in the **Address of website** field.
 - If your version is different, here's the support link for pop-up blockers
[Chrome Instructions / Firefox Instructions](#)
2. Download latest version of Adobe Flash
 - <https://get.adobe.com/flashplayer/?promoid=JZEFT>
 - Follow the onscreen instructions. (You do not need to select the antivirus software. That is a personal preference.)
3. JavaScript needs to be enabled for successful use of the Enterprise Portal.

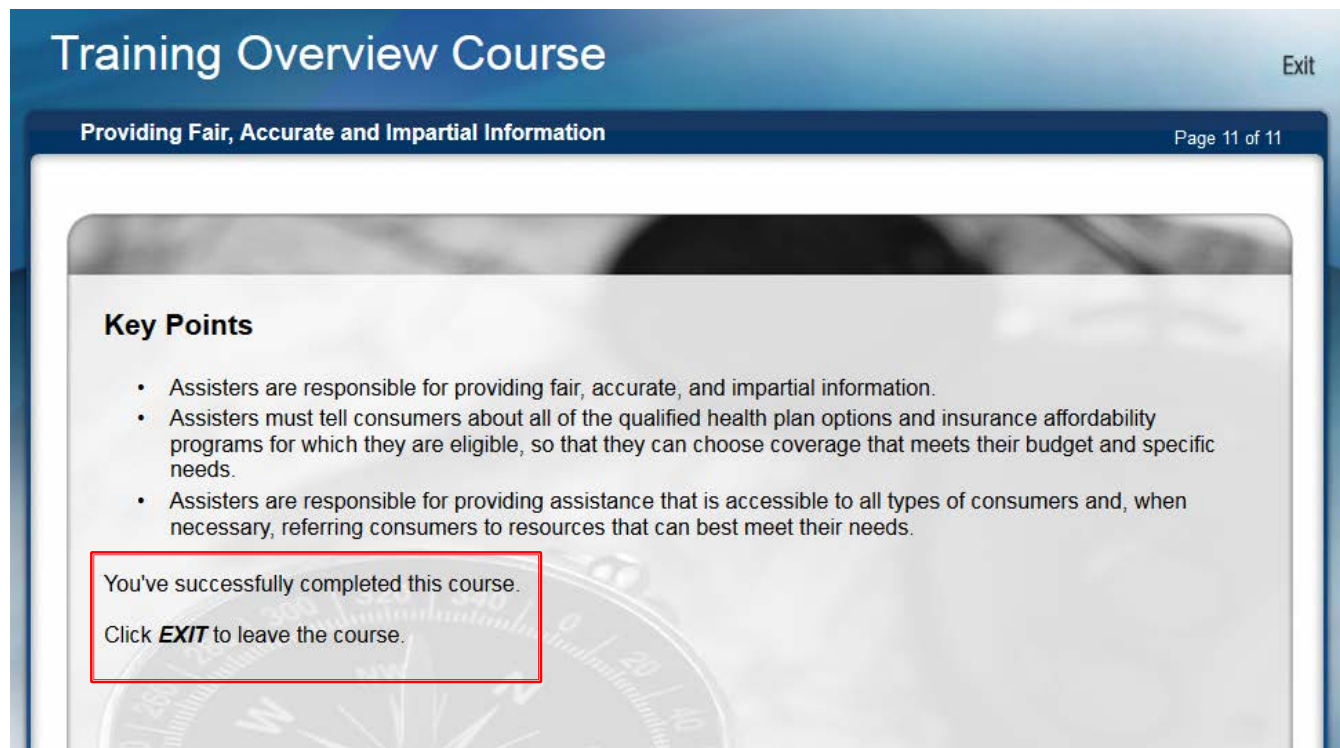
Home or Public Computer

- Some company networks are very restrictive as to what Websites an employee may visit or what browsers may be used at work. Some work machines have additional security controls or software which could interfere with MLMS.
- If you are having multiple issues, try taking your training from your home laptop or computer. If you don't have a laptop or computer at home, try using a computer at a library.

Portal Timeout 30 Minutes

- Enterprise Portal times out every 30 minutes
- Click the Portal window every 28 minutes and look for pop-up box to continue the current session.
- Don't get distracted while taking training. Set a timer for 28 minutes.
- If you timeout, you may need to log back in twice in order to see the **MLMS > Training** link on your Portal page.

Capture Screenshot of Last Page of Course



This is the last page of a course. Take a screen shot of this page. Press **PrtScn**. Open Paint by clicking the **Start** button , clicking **All Programs**, clicking **Accessories**, and then clicking **Paint**. In Paint, on the **Home** tab, in the Clipboard group, click **Paste**. For Windows 8 users, press the **Windows** key + **Prt Sc**.

View Completed Learning

- Some users do not see an updated course completion right away in MLMS. Please navigate to “Completed Learning” after completing each course to verify status. Click “Learning” in the Left Navigation, then Click “Completed Learning”.


Completed Learning

All | Courses | Curriculum |

Name

From To

Completed Learning Modify Table

Name	Status	Assigned By	Marked Complete By	Actions
 001 Training Overview Registration Date: 08/19/2015	Successful On: 08/19/2015			View Details View Learning Assignments Print Certificate

Help Desk Assistance

- If you encounter an error, or your course doesn't show complete even though you completed a course, open a ticket with the Help Desk
- Include in your ticket the following information:
 - Browser Type
 - Operating System
 - Print screens
 - Third party security software installed
 - Whether settings like Pop-up's, Javascript, and Flash are enabled with your browser

Remember To

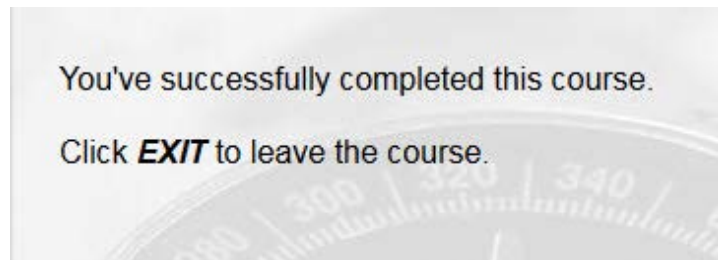
- Only use Firefox or Chrome as your Web browser.
- Prepare your system before accessing the MLMS (turn off pop-up blockers, load Flash, and turn on JavaScript).
- Take your training on a home computer/laptop or public computer (such as the library).
- Take training in 28 minute intervals, and/or check the portal window to ensure you have an active session
- Print a copy of the last page of a course for verification
- Contact the Help Desk for assistance. Provide Browser Type, Operating System, any third party security software installed, and whether settings like Pop-up's, Javascript, and Flash are enabled with your browser.

Final MLMS Do's

- Prepare your system before accessing the MLMS.
- There's no place like Home. There's no place like Home.
 - Select the **Home** button on the left navigation bar to return to the Home page of the MLMS.
- Use Firefox, Chrome, or Internet Explorer as your Web browser.
- Select each and every link on the training content page to activate the **Next** button to appear.

Final MLMS Don'ts

- Don't click the browser's **Back** button.
 - If you click the **Back** button you will need to refresh the page and navigate to your previous location.
- Session Timeout - Don't get distracted while taking training. The Enterprise portal/MLMS will time out in **30 minutes** when no activity is present.
- You don't need to print the training course certificates on the **Completed Learning** page.
- Don't think the course is finished until you see the words



Help Desk Resources

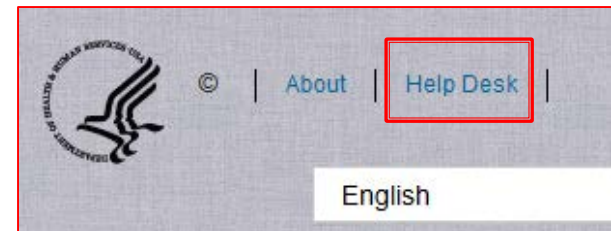
- CMS Enterprise Portal Help Desk

- 855-267-1515
- CMS_FEPS@CMS.hhs.gov
 - User ID / Password Issues
 - No access to MLMS



- MLMS Help Desk

- MLMSHelpDesk@cms.hhs.gov
 - Can't print my certificate
 - Can't find curriculum
 - Training is not launching



Questions?

