Launch of Plan Year 2021 FFE Assister Training

This document is a transcript of the Marketplace assister technical assistance webinar.

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Hello and welcome to today's plan year 2021 Federally-facilitated Exchange (FFE) assister training webinar. I will turn it over to Jabaar Gray. Jabaar, please go ahead.

Cover Slide

Hello everyone, and welcome to this year's FFE Assister training. This year we will have one training and we will have one go-live date, which is imminent.

Agenda

Here are our stated agenda items. It's similar every year and I will not go through every single bullet because you can figure this out. These will come up before every topic area…

Objectives

…just like the objectives.

State Certification and Training Requirements in FFE States

State certification and Training Requirements for assisters in FFE States. Remember there are different requirements for different assister groups. Some states have imposed additional state-specific assister requirements, sometimes including additional training, so please reach out to your department of insurance or whomever regulates insurance in your state and find out what the requirements are if you are a Navigator.

State Certification and Training Requirements for Assisters

Here are the state certification and training requirements for assisters. So for FFE Navigators, CACs, and those State-based (assisters) on the Federal Platform there are eight courses required and you need an 80 percent pass rate. We have an additional five optional courses including a feedback. For returning Navigators, meaning that you have taken the training before, there are seven required courses with an 80 percent pass rate and an additional six courses that are optional that you can take if you so choose. Assisters must fulfill all training and certification requirements prior to Open Enrollment in order to help consumers, which is the goal.

What's New in the MLMS

Generally, the same as last year except that all CACs will need to use the unique ID assigned by the organization they are affiliated with.

Steps to Certification Completion

Steps to certification completion. Obviously the certification is different for different groups. You will get a certificate of completion if you are a CAC or (SBE-) FP or you will get a federal certificate for the Navigators.

Prepare Your Computer System

Before you start everything you want to prepare your computer. Different computers have different security systems so. this is a good time to familiarize yourself with your computer. Some computer security systems are stricter than others. For example, we work for the government so ours is pretty strict whereas my home one is less strict. The third bullet. If you experience technical issues, complete your training on your personal laptop or computer. They tend to have less security and firewalls than, say, your company or nonprofit or government entity. If you do not have access to a laptop or computer, we suggest that you visit your local library.

Steps to Prepare Your System: Pre-Login

Steps to prepare your system. JavaScript needs to be enabled for successful use of the CMS secure portal. The hyperlink there, as with all the hyperlinks, you can click on them to get further instructions. For example, you will also need Adobe Flash and you will need to allow pop-up windows. Open up your browser in Firefox, Chrome, or Internet Explorer, and these are the steps that you can take. These will accompany the blue hyperlinks.

Steps to Prepare Your System: Post-Login

So once you have logged into the MLMS there is a way to verify if your computer system is ready. Once you get to the portlet page, meaning you have already passed the EIDM and landing page in MLMS, once you land on the actual homepage there is a resource area and you can see it says "MLMS: Check Your System" hyperlink.

Steps to Prepare Your System: Post-Login (Continued)

So you will click on that and then it will tell you the assessment of whether or not your system is ready to go. This will tell you what you need to do or what the requirements are for each of those things and it will tell you what your system currently does.

Steps to Certification Completion

So now we are going to register for the CMS Secure Portal ID.

Steps to Register for CMS Secure Portal ID

The first step is the "New User Registration" link. Select the MLMS application. You always agree to the Terms and Conditions. You have to register your information. Create a user ID and password. Complete three challenge questions and review.

Step 1: Select New User Registration Link

This is if you do not have a portal account now, so if you are brand-new. So this is the homepage that you would go to on the CMS.gov portal. Notice the blue box at the bottom there. That is for the brand-new users so if you are a brand-new assister and you have never done a training and you have never been to MLMS, you would use that bottom blue box. If you are returning, you definitely want to go to the login with the green button. Chances are your password is out of date. I think they require an update every 30 days or something like that. You will probably have to reset your password but because we now have ID proofing, you can't circumvent this because it will have all of your old information in the database. It will have your old email addresses and your name that were previously in there so we'll look at that in a second. So we are going through this now as if you are brand-new.

Step 2: Select MLMS Application Step 3: Agree to Terms and Conditions

You've checked the box and come to the screen where it asks you to choose the application. That means that the portal has many other systems on it so it doesn't automatically know that you want to receive the assister training. So you would select the MLMS and scroll down on the "Choose Your Application" and then you would agree to the Terms and Conditions, which we always do, and press the green button.

Step 4: Register Your Information

Here you will register your information. You do not need to put your Social Security Number in there. Once you put in all your information accurately, press the green button and advance.

Step 5: Create Unique ID and Password

No dialogue.

Step 6: Answer Challenge Questions

Here you are going to create your unique ID and password and answer challenge questions. So again, try to pick challenge questions that are static, meaning they don't change, like your oldest niece hopefully will obviously always stay that one person. Your favorite pet name can be challenging whether it is your current pet or a childhood pet. I've run into that issue trying to remember which it was. Same with your childhood best friend. I had a bunch of them. I remembered what I picked seven years ago luckily when I had to use these challenge questions recently.

Step 7: Review Registration Summary

So now you have a Registration Summary and you will have that confirmation in the second box. After verifying your information, the confirmation page will use the link here to log in to the CMS secure portal. You will click there at the bottom of that confirmation.

Steps to Certification Completion

No dialogue.

Steps to Request Access to MLMS

These are the steps that we are going to go through to get to the MLMS.

Step 1: Login to CMS Portal

Now you have your ID and password and you have entered them and you select the "Terms and Conditions" and press the green button to advance.

Step 2: Select Request/Add Apps

So it will say "Use the below link to request access to the CMS Systems/Applications." Right there where that plus is – you will hit that.

Step 3: Search for FFE/Request Access

Then you are going to search for the FFE MLMS. Usually you just type in here "FF" or "FFM" and it will populate that with the "FFM MLMS." You see that red button there that says "Request Access"? Select that.

Step 4: Select System Description/Assisters Role

Now it will ask you "Is this the FFM training access that you are seeking?" Yes, but notice the second box asks you which role. There are multiple roles you can have in MLMS. Please select assisters. Do not pick those other roles because this is controlled by the CMS portal; this is not under CCIIO's control. If you put in the wrong information here and you will have to get that changed, CCIIO will not be able to help you. You will have to go to the Portal Help Desk to have them do that. So once you have successfully and correctly put assister as your role, go to the blue "OK" button and hit that…

Step 5: Identity Verification

…and we will move on to identity verification, which was new last year. You will hit the "Next" – always agree to the Terms and Conditions – and select "Next." So I wanted to take a moment to talk about the ID verification. It is typical when you apply for a credit card, it will ask you some

information to verify that you are in fact who you say you are, the last four numbers of your Social Security, it is standard stuff. Once you have your ID verified and they are satisfied that it is in fact you…

Steps to Certification Completion

…you then will go back to the portal page because now it has gathered your information and stored it, and now you have proven to them that you are who you are so that is also being stored in the database. So that's why you have to go repeat these processes for the first time when you are a new registered user.

Steps to Access MLMS

You have registered your information and you have been ID proofed. Now you will go back to the portal and from there we will get to the training site.

Step 1: Login to CMS Portal

You will come in with your new ID and password and you select the Terms and Conditions and hit the green "Login" button.

Step 2: Select MLMS Training Tile

You will see your MLMS button there that is populated. You have not chosen anything else so you only have that one. You hit that one where it says "Training" because that's what we are here for, and we move on.

Step 3: Complete MLMS Assister Profile Page

All individual Navigators should ensure they register for and complete the 2021 Navigator Training using the unique Navigator ID number assigned by the CMS grantee organization they are affiliated with. Unique Navigator ID numbers will be made available to grantees and organizations. Use the unique Navigator ID number to ensure that the Navigator certificate issued by us reflects the current ID number and the current affiliation with the CMS Navigator grantee organization. Navigators should not begin the 2021 training until after the award announcement. If you are a brand-new Navigator and you have not taken the training, make sure you have your Navigator ID assigned to you because you will need that and we will be verifying that with another database of ours. You will not be able to proceed into the training and get your Navigator certificate unless that ID matches what we have in the database.

Step 3: Complete MLMS Assister Profile Page: New Navigator

So we have gotten through the portal and we are now on the MLMS Assister Profile page as if you are a brand-new Navigator. It would ask you what kind of assister type you are; you would

select "Navigator," and organization type. You would select that and save it and advance. Complete required fields and select "Save/Update."

Step 3: Complete MLMS Assister Profile Page: Returning Navigator

Returning Navigator accounts will be validated upon login. If the system is unable to validate the account, you will be prompted to contact the appropriate help desk. Hopefully you entered in the ID correctly.

Step 3: Complete MLMS Assister Profile Page: Certified Application Counselor

All individual CACs should ensure they register for and complete the 2021 CAC ID number assigned to them by their organization. Like Navigators, we will be verifying CAC IDs with another database of ours. You will not be able to proceed into the training unless the CAC ID entered here matches what we have in that database. If you are a certified application counselor, you would see the first red bold in asterisks is the "Assister Types" and you would put in "Certified Application Counselor." For the organization type, it would be the CAC designated organization (CDO). You would click on down to the "Save" next.

Step 3: Complete MLMS Assister Profile Page: State Based Exchange Using the Federal Platform

All right. If you are a State-based Exchange that uses the federal platform, you are a state system that has its own assister program but you use the federal training site; you would check under "Assister Type," "SBE-FP Assister" and put in the "State-based Exchange" organization type and then save and update and advance.

Step 4: Access MLMS Assister Portlet Landing Page

Once that information is collected you will land on your portlet landing page with the silhouetted fellow or ma'am. You see the home page there. You see the hyperlinks for "Current Learning," "Curriculum Status," "Training Options," and "Transcripts." This is the MLMS Assister Portlet Landing Page. To return to this page at any time, select "Home" on the left Navigation bar.

Steps to Certificate Completion

No dialogue.

Steps to Enroll in Curriculum

Now we want to enroll in a curriculum and we will go through these steps to do so.

Step 1: Select Actions and then Enroll

So we are on the system portlet and you will need to go on the top left-hand side where it says "Select Training Options." That's the third hyperlink there, and you want to hit that. Then the training options will pop up. You want to go to "Actions" and it will ask you which actions. "Do you want to view details?" No, you want to begin enrollment. You want to scroll down to that. To see required curriculum go to the "Training Options" page. Select "Actions" next to the course name and select "Begin Enrollment."

Step 2: Select Complete Enrollment

Once you have chosen the curriculum – this one would be the Plan Year 2021 FFE Navigator Curriculum – that will populate which courses you have to take. You will then select the "Complete Enrollment" button. The curriculum is displayed under this Plan Year 2021 Navigator. Select the modules and select "Complete Enrollment." Notice some modules includes both a course and an assessment to complete. Please select those. It will tell you which ones are required, so select all the required ones. You do have the option to take optional courses if you so choose.

Step 3: Select Go To Current Learning

No dialogue.

Step 4: Select Launch

To begin a course or assessment, go to the "Current Learning" page on the left-hand side. A new window opens displaying "Training Courses" or "Assessment." It will populate the course and the current learning, and you want to press the "Launch" button, and that will take you to the actual course.

Steps to Certificate Completion

Steps to complete required training.

Steps to Complete Required Training

Select "Next" to advance training. Select all links on the screen. Select "Exit" when finished. If you need to exit before completing the course, your location is bookmarked, and you can return to the spot when you return to the course. You can take screenshots in case there is anything wrong, and we can help you resolve that. The fifth is to review your completion status and a detailed status view.

Step 1: Select Next to Advance Training

We will show you how to navigate this. At the bottom right-hand there is a "Next" button. That's important – to navigate through the system and not through your browser. That will become apparent. On the training course, use the "Next" button to advance the training course and the "Back" button on the course window to return to the previous page. You want to use the "Back" button and not the browser "Back" button. Those systems are not necessarily in sync; they are independent of each other is what I am trying to get at.

Step 2: Select All Links

When going through the courses, you want to select all the blue hyperlinks and they will populate with information. A pop-up will come up, and then you will hit the "Next" button at the bottom. You also want to go through the Knowledge Checks, which are there to make sure you are retaining the information.

Step 3: Select Exit

Okay. Like the "Back" button, selecting the "Exit" button is very important. Once you hit that "Exit" button, that will submit information to the MLMS database where you are in that actual course. If you just exit via the browser, that does not send the information to the database, so there could be discrepancies there.

Step 4: Take Screen Shot of Course Completion Page

Once you have completed a course, take a screenshot at the very end where it says "You have successfully completed this course," and store it just in case there's any discrepancies where you just did seven hours of training and then it says you did not do it. So then you can reach out to the Help Desk and we will have proof that you actually did do it.

Step 5: Review Completion Status: Detailed Status View

So review completion status. This is the Detailed Status view. If you want to see all of the courses that you are assigned and which ones you have completed and which ones you have not successfully completed, etcetera.

Step 5: Review Completion Status: Graphical View

This is the Graphical view. It is just a different look for the same information.

Steps to Certificate Completion: Print Certificate

Print Certificate. Now we are going to go through the steps to print the certificate.

Steps to Print Certificate

These are the steps which we will go through now.

Step 1: Select Curriculum Status

No dialogue.

Step 2: Select Actions and Print Certificate

So you are done with the curriculum. So what we are going to do is go to "Curriculum Status" underneath the key (image of a locked padlock). Press that and then it will show you where you are with the curriculum, and hopefully it tells you that you have passed. So under the actions over there, that blue hyperlink – that bottom one – will say "Do you want to print a certificate?" The yellow box on the bottom is reminding you that you may need to select to activate your Adobe Acrobat link on the screen in order to see and print the certificate.

Step 3: Print Certificate: Navigator

This is the federal Navigator one which will be populated based on the MLMS database, and make sure that the Navigator ID is correctly populated on the certificate.

Step 3: Print Certificate: Certified Application Counselor

This is the certified application counselor certificate of completion…

Step 3: Print Certificate: State Based Exchange Using the Federal Platform

…and same with the State-based Exchange on the Federal Platform. I just wanted to show you the different ones in case you arrive at a certificate that you question as to if that is the correct one for you or not.

Steps to Certificate Completion: Relaunch Completed Course

Okay, steps to certificate completion. How to relaunch a completed course. Say you finished the course and moved on to some other courses, but you breezed through it or if there was some information you want to revisit, this will show you the steps to go back to the course. If you are in a curriculum and you completed the second course, it is assuming that you are done with that course but sometimes folks like to revisit information from time to time, and we will help you get there.

Steps to Relaunch Completed Course

These are the steps. We will go through that now.

Step 1: Select Curriculum Status and Curriculum Name

We're in the portlet. Go to the left-hand side and choose "Curriculum Status." This will show you your curriculum; so this one is the Navigator one. You select that. So notice the bar at the bottom says "Completed courses or modules moved from current learning to the curriculum status page." It is no longer your current learning because you are not currently taking that. It's under the Curriculum Status page. If you are unsure about why you don't see one of the courses you previously completed, it is because it has moved based upon you completing it.

Step 2: Select Recent Course History and View Results

So here we can select "Recent Course History" and view the results. On the green button where it says "Recent Course History," we would hit that and then if you want to see the actual results for the courses, you would hit that on the right-hand side.

Step 3: Select Launch

Now, if you are trying to revisit a course you had already completed, it will show that you have completed this and it will have moved it from your "Current Learning" to your "Curriculum" and you have the option to launch it over there or to start it over.

Step 4: Course Opens

You press the button and the course should pop up. Okay.

Steps to Certificate Completion: Assister Feedback

Assister feedback.

Steps to Complete Assister Feedback

These are the individual steps for that.

Step 1: Select Launch and Begin Survey

So select "Launch" and "Begin Survey." You completed the whole curriculum. Over here in the Actions item it says that the assister feedback may be launched from the training options page. You have two options but regardless, you would launch the feedback, and it will navigate you to that. The Assister Feedback is trying to ascertain how valuable individual courses were. You do not have to do it, it is optional, but if you choose to give us some feedback we highly appreciate it.

Step 2: Select Completed Curriculum

You would check the assister course that you have completed and submit that...

Step 3: Select Feedback Response

…and it would give you the actual survey or feedback. Select "Skip" to any questions you do not want to answer or are not applicable, for example a course you did not take or a subject that was not in your course. You cannot go back after you skip a question. You must select "Submit" on the last question page to ensure that your answers are saved, kind of like the "Exit" button. That will launch the information into our database.

Troubleshooting: Prepare Your Computer System

So troubleshooting. We are going to go through the Prepare Your Computer System subject.

Prepare Your Computer System: Internet Browsers

Internet browsers. The following are approved browsers. These are browsers we know work well with this system: Internet Explorer, Chrome, and Firefox. That's not to say that others do not; we just cannot verify that. If you experience technical issues, we recommend clearing your cache. Select the appropriate browser link for instructions on how to do that. If you are having issues doing that, there is no shame in that. I have trouble with that myself. We have the hyperlink that will launch the instructions for you given the correct Internet browser.

Troubleshooting: Access MLMS

If you are having trouble accessing the MLMS, these are the steps to help.

Access MLMS: MLMS Landing Page

Access MLMS. 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. If it doesn't automatically do it, try the "Next" button; maybe that will do it.

Troubleshooting: Complete Required Training

Okay. Complete required training.

Complete Required Training: Portal Time Out

Portal time out. So remember that you go to the portal and the portal has 30 or more different systems in it. So the reason that I bring that up is because the portal and the MLMS may not always be in sync. It will launch you, but sometimes you need to go back to the portal to make sure that you are not being timed out because after a certain amount of time, inactivity on its page will automatically shut down its application. That stinks because you will complete your course in MLMS but it will not be able to communicate that information back to the portal. So the secure portal times out every 30 minutes. So that means if you have been in a course for over

30 minutes and you did not go back to the portal, it will automatically shut down. So click on the portal window every 20 minutes and look for a pop-up box to continue the current session. So you would minimize your page – your course that you are working on – and make sure that the portal, which will be behind your page, is still active. It will tell you if it is timed out or is about to time out. Do not get distracted while taking your training. Set a timer for 28 minutes. If your session is timed out, you may need to clear your cache or log back in twice in order to see the MLMS training link on your CMS Secure Portal page.

Troubleshooting: Complete Optional Training

If you want to complete optional training, this is how you would do that.

Complete Optional Training

Obviously we would be in the CMS portal so you would log in to the portal and that will direct you to the MLMS profile page. Select the "Save/Update" button. Select the "Training Options" and "Enroll in the Desired Curriculum" using actions on the right-hand side and select "Complete Enrollment" and select "Go to Current Learning." The optional courses you did not take as part of the previous curriculum will now appear in the "Current Learning." All of the courses are there; it is just about getting the right courses into the right category for you to be able to find it.

Troubleshooting: Resources

And resources.

Resources: Help Desk Information

This slide deck, which we will post on the cms.marketplace.gov assister page – I tell you this because if you don't know which Help Desk to go to, you can go to the end of this training deck and it will tell you. If you need to reach the Help Desk that helps MLMS specifically, that is the email address. If you need to go to the Enterprise Portal, for example you did not select the right role or you are having issues logging in to the portal, you would go to this. The two systems and two Help Desks are independent of each other. So to minimize your frustration think about what your issue is and who can help you the best. Generally, they would ask you for the following information: a screenshot of the "Check Your System Configuration" page. They want to see that you are correctly configured. That is an easy one to get off the list. A screenshot of whatever issue you are having. "Third-party Security Software Installed." They want to know if that is the case or if Flash is installed. For example, I have a new laptop and I selected the McAfee – that's what came on the computer – but that does not make it the security software that other systems would prefer.

Resources: Quick Reference Guides

Quick reference guide, which will be posted and will have all of the hyperlinks that you need here to figure out how to do step-by-step some of these steps. Here is the hyperlink to that guidance…

Resources: Frequently Asked Questions

…and the Frequently Asked Questions. Basically there are five or six documents, step-by-step registration and Frequently Asked Questions and we are showing you those right now. The training slides will be there, etc. Those are valuable resources to help you get through your issues because if you can, you want to do it yourself instead of sending the email to Help Desk and then they ask you for information and then you gather that information and they assess the information…so you get my point. If you want to do it yourself, the reference guides will help you do that. If you have any questions, the moderators will tell you how to do that. My name is Jabaar Gray and thank you. Have a great Open Enrollment.

Questions?

Thank you for that presentation, Jabaar. While you are going over this presentation, if you have any further questions that were not answered within this presentation, you can always send an email to the CAC inbox, and that email is CACQuestions@cms.hhs.gov. Thank you and have a great Open Enrollment.