



Launch of Plan Year 2017 FFM Assister Training

*FFM PY2017 Assister
Training*

*Jabaar Gray
July 6, 2016*



Agenda

- Objectives
- Certification Requirements
- System Requirements and Reminders
- Summary of Steps to Certification Completion
- Demonstration of Processes
- 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
- Enroll into the appropriate Assister curriculum
- Complete training
- Print a training completion certificate
- Re-launch Course
- Select Spanish curriculum
- Complete Feedback
- 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.
- Assistors 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, 2016.

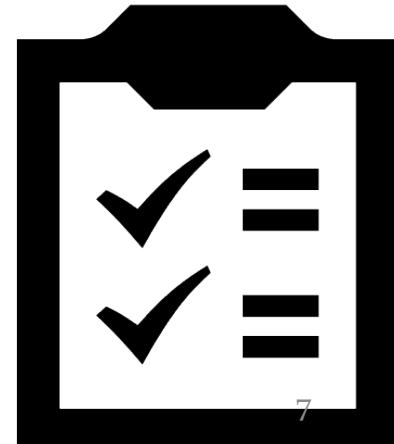
* See slide 105 for instructions on how to enroll in optional courses.

What's New in the MLMS?

- Check your System Configuration link
 - Located on the MLMS Assister Landing page in the Assister Announcement Portlet
- Print only Curriculum Completion Certificates
 - You can no longer print course-level completion certificates
- Changes to MLMS Navigation
 - Navigation choices: Home, Current Learning, Curriculum Status, and Training Options
- Spanish Language selection
 - Select Spanish, Logout, Log in, MLMS and Curriculum in Spanish
- Optional Feedback Request after completing Curriculum
 - 35 Optional questions to answer about training experience/curriculum

Steps to Certificate Completion

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



Preparing Your System

1. JavaScript needs to be enabled for successful use of the Enterprise Portal.
 - <http://enable-javascript.com/>
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. 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, use the support link listed below for pop-up blockers [Chrome Instructions](#) / [Firefox Instructions](#) / [Internet Explorer](#)

Preparing Your System

1. On the MLMS Assister Landing page, verify that your computer is ready, by clicking the **Check your System Configuration** link.



Preparing Your System

2. Below is an example of the information you might see when clicking the **Check your System Configuration** link. Use this information as a guide to modify your computer/laptop settings (if necessary) to have an ideal training experience. If submitting a ticket to the help desk for technical help, complete these steps first and provide a screen shot of your system results for faster assistance.

MLMS Check your System

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.

	Recommended Settings
1 Javascript Status	Enabled
2 Internet Browser	Firefox, Chrome, Internet Explorer
3 Screen Resolution	1024 x 768
4 Pop-Up Blocker	Not Blocked
5 Cookies Enabled	Yes

Your System Results
JavaScript is Enabled
Firefox (45)
1600 x 900
Not Blocked
Yes



Steps to Certificate Completion

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



Log In to CMS Portal/MLMS

If you used the MLMS last year, you should already have a CMS Portal ID and password. Having these two items will allow you to access the MLMS. Follow the instructions beginning on **page 13**, to log in to the MLMS.

If you have never obtained a CMS Portal ID or logged into the MLMS, follow the instructions beginning on **page 21** to learn how to obtain an ID and gain access to the MLMS.

Log in to CMS Portal/MLMS

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 select **Next**
4. Type your Password and then select **Log In**
5. Select **MLMS**, and then select **Training**
6. Update information on the Profile page, and click **Save/Update** or if no changes are made, select **Next**



Step 1: Select Login to CMS Secure Portal

The screenshot shows the CMS Enterprise Portal homepage. At the top, there's a navigation bar with links to Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the navigation is a search bar labeled "Search CMS.gov". A large yellow speech bubble in the center of the page contains the text "Select Login to CMS Secure Portal.". To the left, there's a section titled "Welcome to CMS Enterprise Portal" with a sub-section about the portal being a gateway to various CMS programs. Below this are links for CMS Enterprise Portal, MACBIS, Medicare Shared Savings Program, Physician Value, ASP, Open Payments, QMAT, CPC, Innovation Center, MLMS, CU, and PECOS. To the right, there's a "CMS Secure Portal" section with a "Login to CMS Secure Portal" button (which is highlighted with a red border), and links for Forgot User ID?, Forgot Password?, and New User Registration.

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 have forgotten your User ID or password, click the appropriate links below the **Login to CMS Secure Portal** button.

Step 2: Accept the Terms and Conditions

The screenshot shows a web page titled "Terms and Conditions". At the top, there are two buttons: "Health Care Quality Improvement System" and "Provider Resources". Below the title, it says "OMB No.0938-1236 | Expiration Date: 04/30/2017 | Paperwork Reduction Act". The main content area contains several paragraphs of text about government information systems and privacy. A large yellow speech bubble with the text "Select I Accept." points to the "I Accept" button at the bottom left. The "I Accept" button is highlighted with a red border.

Health Care Quality Improvement System Provider Resources

Terms and Conditions

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) any local or remote server or processing system now or later in operation or connected thereto, and (4) all devices and storage media attached to this network or to a computer on this network. This information system 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 under U.S. law.

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, read, 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.

I Accept Decline

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

The screenshot shows the CMS Enterprise Portal login screen. At the top, the CMS.gov logo and "Enterprise Portal" are displayed, along with links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the logo, it says "Centers for Medicare & Medicaid Services". The main heading is "Welcome to CMS Enterprise Portal". A yellow speech bubble contains the text "Type your User ID." A red box highlights the "User ID" input field. Another yellow speech bubble contains the text "Select Next.". A red box highlights the "Next" button. Below the input field and button are links for "Forgot User ID?" and "Need an account? Click the link - [New user registration](#)".

Type your User ID.

Select Next.

User ID

Next Cancel

[Forgot User ID?](#)

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

If you need assistance with a forgotten **User ID** or you realize you have never registered, click the **New user registration** link.

Step 4: Type Your Password, and then select Log In

The screenshot shows the CMS Enterprise Portal login screen. At the top, there's a navigation bar with links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the navigation, the CMS logo and "Enterprise Portal" are displayed, along with the text "Centers for Medicare & Medicaid Services". A horizontal menu bar contains "Health Care Quality Improvement System" and "Provider Resources". The main area has a teal header "Welcome to CMS Enterprise Portal". It features a "Password" input field with a red border, a "Log In" button with a red border, and a "Cancel" button. A "Forgot Password?" link is also present. Two large yellow speech bubble callouts are overlaid on the page: one pointing to the password input field with the text "Type your Password.", and another pointing to the "Log In" button with the text "Select Log In."

If you need assistance with a forgotten **Password** select the **Forgot Password?** link.

Step 5: 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.

If the **MLMS** tab does not appear on your portal page, you will need to request access to the MLMS. See **page 34** for further instructions.

Step 6: 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: *

CAC ID:

Current CAC Training Expiration Date:

Organization Name:

Organization Street Address:

Organization City:

Organization State:

Organization Zip Code:

Organization Phone Number:

Update the fields if any of your information has changed.

Select Next if you did not change any information.

The field names in red with an asterisk should already contain information from last year. If you need to change any information, click Save/Update.

Log in to CMS Portal/MLMS

The screenshot shows the CMS Enterprise Portal Assister Landing page. At the top, there are links for 'Portal Help & FAQs' and 'Print'. The CMS logo is on the left, followed by 'Enterprise Portal'. Below the header, there are two yellow buttons: 'My Portal' and 'MLMS ▾'. The breadcrumb navigation shows 'CMS Portal > MLMS > Training'. On the left sidebar, there is a user profile icon and a menu with options: 'Home', 'Current Learning', 'Curriculum Status', and 'Training Options'. The main content area has four sections: 'Assister Announcement' (with a note to check system configuration), 'Current Learning' (listing a course titled 'Training Overview Pilot Course 30Mar2016' located online, marked as 'In-Progress' with a 'Launch' button), 'Assister Resources' (empty), and 'Curriculum Status' (empty). The user 'Diane Johnson' is logged in at the top right.

The MLMS Assister Landing page is displayed.

Register for CMS Portal and MLMS

If you have never logged into the MLMS or obtained a CMS Portal ID, the following instructions outline the steps. Once you have completed these steps, you can use the CMS Portal Log In instructions (located on **pages 13 – 20**) to reach the MLMS.

There are two groups of steps to getting started. First you Register for a CMS Portal ID. Secondly, after you have your ID, you log in to the CMS Portal and request access to the MLMS. When you have completed these steps you are ready to log in to the MLMS.

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

CMS.gov Enterprise Portal
Centers for Medicare & Medicaid Services

Home | About CMS | Newsroom | Archive | [Help & FAQs](#) | [Email](#) | [Print](#)
Learn about [your healthcare options](#) Search CMS.gov

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.

Select New User Registration.

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

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 Provides Health Coverage for 100 Million People...



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

**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 and privacy of your personal information. When you register to EIDM, Please read the [CMS Privacy Act Statement](#) which describes how we use the information you provide.

Collection Of Personal Identifiable Information
"Personal" information is described as data that is unique to a person, such as name, address, or Social Security number. CMS is very aware of the privacy concerns around PII data. In fact, CMS has strict policies and procedures in place 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 2010-0002.00. I understand that it is illegal to violate the HHS RoB or information security policies and standards, work on Federal contracts or projects; and/or revocation of access to my employment, information systems, and/or facilities; and may also include imprisonment. I understand that exceptions to the HHS RoB must be requested in advance in writing by the OPDIV Chief Information Officer or his/her designee. I understand that violation of laws, such as the Privacy Act of 1974, copyright laws, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fine and/or imprisonment.

Select the checkbox I agree to the terms and conditions.

Select Next when it appears.

I agree to the terms and conditions

Cancel **Next**

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: 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

Finish completing the required fields.

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

* Primary Phone Number:

Select Next.

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

Select your Challenge Questions and Answers:

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

* Question:1

* Question:2

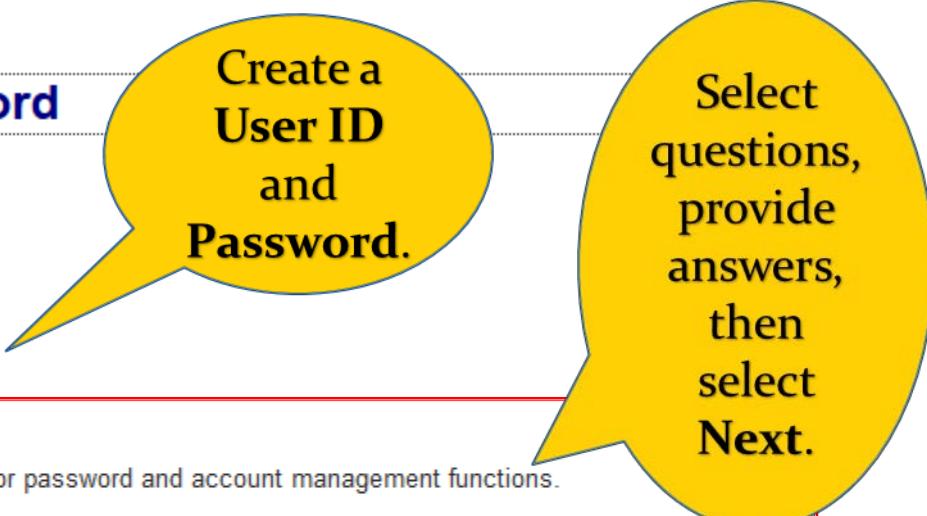
* Question:3

* Answer:1

* Answer:2

* Answer:3

Cancel **Next**



The form is divided into two main sections. The top section, titled 'Choose User ID And Password', contains three text input fields for User ID, Password, and Confirm Password. The bottom section, titled 'Select your Challenge Questions and Answers:', contains six fields: three for challenge questions and three for their corresponding answers. The challenge question fields are grouped together and highlighted with a red border, while the answer fields are grouped together and also highlighted with a red border. Two yellow speech bubbles point from the right towards these grouped fields. The first bubble, pointing to the challenge questions, contains the text 'Create a User ID and Password.'. The second bubble, pointing to the answers, contains the text 'Select questions, provide answers, then select 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

The screenshot shows a registration process with the following steps: Your Information, Choose User ID and Password, and Complete Registration. The 'Complete Registration' step is highlighted with a blue background. Below it, a message states 'Account Successfully Created'. It informs the user they have successfully created an account and will receive an email confirmation. It also instructs them to log on to the CMS Enterprise Portal using their new User ID and password, after a 5-minute wait. A callout bubble points to the 'OK' button.

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.



You now have an Enterprise Portal ID and password.

Requesting Access to 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 select **Next**
4. Type your Password and then select **Log In**
5. Select **Request Access Now**
6. Type FFM into the search field, and then click **Request Access** when the FFM/Training tile is displayed
7. Select **Assisters** role, and then select **Submit**
8. 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

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 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](#)

CMS Provides Health Coverage for 100 Million People...

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

Get E-Mail Alerts Non-Production Environments

Step 2: Accept the Terms and Conditions

Health Care Quality Improvement System Provider Resources

Terms and Conditions

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, and (4) all devices and storage media attached to this network or to a computer on this network. This information system 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.

I Accept Decline

Select I Accept.

Step 3: Type Your Portal ID

The screenshot shows the CMS Enterprise Portal login screen. At the top, the CMS.gov logo and "Enterprise Portal" are displayed, along with links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the logo, it says "Centers for Medicare & Medicaid Services". A navigation bar includes "Health Care Quality Improvement System" and "Provider Resources". A large blue header bar says "Welcome to CMS Enterprise Portal". The main form area has a red border. It contains a "User ID" input field with a red border, a "Next" button with a red border, and a "Cancel" button. Below the form are links for "Forgot User ID?" and "Need an account? Click the link - [New user registration](#)". Two yellow speech bubbles with black text are overlaid on the page: one pointing to the "User ID" field containing the text "Type your User ID.", and another pointing to the "Next" button containing the text "Select Next."

Type your User ID.

Select Next.

User ID

Next Cancel

[Forgot User ID?](#)

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

Step 4: Type Your Password, and then select Log In

The screenshot shows the CMS Enterprise Portal login screen. At the top, there's a navigation bar with links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the navigation is the CMS logo and the text "Enterprise Portal" and "Centers for Medicare & Medicaid Services". There are two yellow buttons: "Health Care Quality Improvement System" and "Provider Resources". A large blue header bar says "Welcome to CMS Enterprise Portal". Below it, there's a form with a "Password" input field (which has a red border) and a "Log In" button (which also has a red border). Next to the "Log In" button is a "Cancel" button. Below the form is a link "Forgot Password?". Two yellow speech bubbles with black text are overlaid on the page: one pointing to the "Log In" button with the text "Type your Password.", and another pointing to the "Log In" button with the text "Select Log In.".

Home | About CMS | Newsroom | Archive | ? Help & FAQs | 📧 Email | 🖨 Print

CMS.gov | Enterprise Portal

Centers for Medicare & Medicaid Services

Health Care Quality Improvement System

Provider Resources

Welcome to CMS Enterprise Portal

Type your Password.

Select Log In.

Password

Log In

Cancel

[Forgot Password?](#)

Step 5: Select Request Access Now

The screenshot shows the CMS Enterprise Portal interface. At the top left, there is a navigation bar with 'CMS Portal > My Portal'. Below it, a large yellow speech bubble contains the text 'Select Request Access Now.' A blue arrow points from this text towards a red-bordered button labeled 'Request Access Now' on the right. The main content area has a heading 'Welcome to CMS Enterprise Portal' and a paragraph describing the portal's features. On the right side, there is a 'Contact Help Desk' section with information about the FFE / HIOS / Agents & Brokers Help Desk.

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

Select Request Access Now.

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 6: Search for FFM/Training

The screenshot shows the CMS Portal's My Access page. At the top left is a yellow button labeled "My Portal". The navigation bar includes "CMS Portal > EIDM user menu page > My Access". Below this is the "Access Catalog" header with a search bar containing the letter "f". A speech bubble points to the search bar with the text "Type FFM.". The search results show a section titled "FFM/Training – Agents/B/Assisters" with a note: "Agents and brokers must first request access to 'FFM' and then request the Agents and Brokers role." A "More..." link is below this. A "Request Access" button is highlighted with a red box. A speech bubble points to this button with the text "Next, select Request Access." The "Help Desk Information" section includes a phone number 855-287-1515.

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 7: 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, 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. You will also be required to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until the requested LOA is established and Multi-Factor Authentication (MFA) is established.

* System Description:

FFM/Training – Agents/Brokers/Assiste

Please select a role

* Role:

Assisters

Cancel

Submit

Select
Assisters
from the list
of roles.

Select
Submit.

Assisters do not need to complete Identity Verification.

Step 8: Select OK

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](#)

Successful Completion!

To complete your access request for the Marketplace Learning Management System (MLMS), please log-out by clicking the "OK" button below, wait two minutes, and then log back in. To log back in, please click the "Login to CMS Secure Portal" button on the right side of the CMS Enterprise Portal homepage.

OK

A yellow speech bubble points to the 'OK' button with the text "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.

First Log in after Requesting Access

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 select **Next**
4. Type your **Password** and then select **Log In**
5. Select **MLMS**, and then select **Training**
6. Complete Profile page information, and click **Save/Update**



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

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 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](#)

CMS Provides Health Coverage for 100 Million People...

Medicare.gov 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

Health Care Quality Improvement System Provider Resources

Terms and Conditions

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) all components of this computer and network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system 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.

I Accept Decline

Select I Accept.

Step 3: Type Your Portal ID

The screenshot shows the CMS Enterprise Portal login screen. At the top, the CMS.gov logo and "Enterprise Portal" are displayed, along with links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the logo, it says "Centers for Medicare & Medicaid Services". A navigation bar includes "Health Care Quality Improvement System" and "Provider Resources". A large blue header bar says "Welcome to CMS Enterprise Portal". On the left, there is a "User ID" input field and two buttons: "Next" and "Cancel". The "Next" button is highlighted with a red border. Two yellow speech bubbles with black text are overlaid on the page: one above the input field saying "Type your User ID." and one below the buttons saying "Select Next.". At the bottom, there are links for "Forgot User ID?" and "Need an account? Click the link - [New user registration](#)".

Type your User ID.

Select Next.

User ID

Next Cancel

[Forgot User ID?](#)

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

Step 4: Type Your Password, and then select Log In

The screenshot shows the CMS Enterprise Portal login screen. At the top, there's a navigation bar with links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the navigation is the CMS logo and the text "Enterprise Portal" and "Centers for Medicare & Medicaid Services". A horizontal menu bar includes "Health Care Quality Improvement System" and "Provider Resources". The main area has a teal header "Welcome to CMS Enterprise Portal". It features a large yellow speech bubble containing the text "Type your Password." and another yellow speech bubble containing "Select Log In.". A red box highlights the "Password" input field, and another red box highlights the "Log In" button. A link "Forgot Password?" is also visible.

Home | About CMS | Newsroom | Archive | ? Help & FAQs | Email | Print

CMS.gov | Enterprise Portal

Centers for Medicare & Medicaid Services

Welcome to CMS Enterprise Portal

Type your Password.

Select Log In.

Password

Log In

Cancel

[Forgot Password?](#)

Step 5: 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 (with **Training**) appears on your **Portal** page.

MLMS Profile Page

The Profile page appears every time you access the MLMS. The first time, you must complete the required fields. On subsequent log ins, you can update the fields when they change and select the **Save/Update** button. If no changes are required, select the **Next** button.

 [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 you assiter 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: *

Step 6: 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:	<input type="text"/>
Assister Type: *	-Select One- <input type="button" value="▼"/>
Training Language Selection: *	English <input type="button" value="▼"/>
How Many Years Have You Been an Assister: *	-Select One- <input type="button" value="▼"/>
When Did You Last Complete Federal Assister Training: *	-Select One- <input type="button" value="▼"/>
Organization Type: *	-Select One- <input type="button" value="▼"/>
Organization Name:	<input type="text"/>
Organization Street Address:	<input type="text"/>
Organization City:	<input type="text"/>
Organization State:	-Select One- <input type="button" value="▼"/>
Organization Zip Code:	<input type="text"/>
Organization Phone Number:	<input type="text"/>

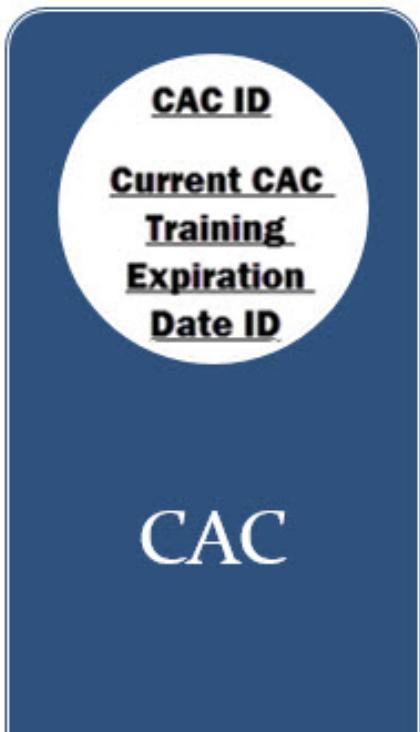
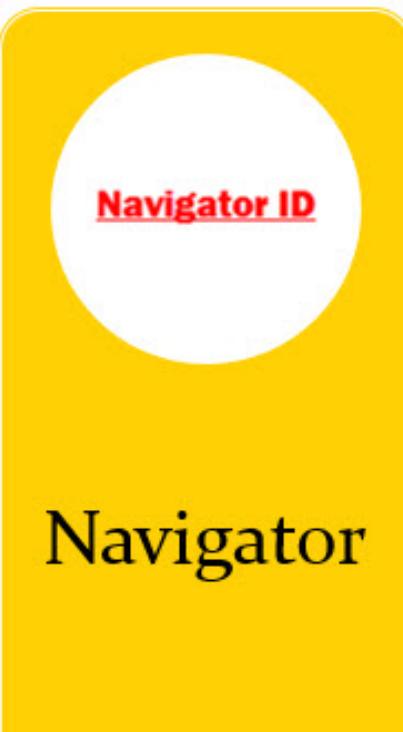
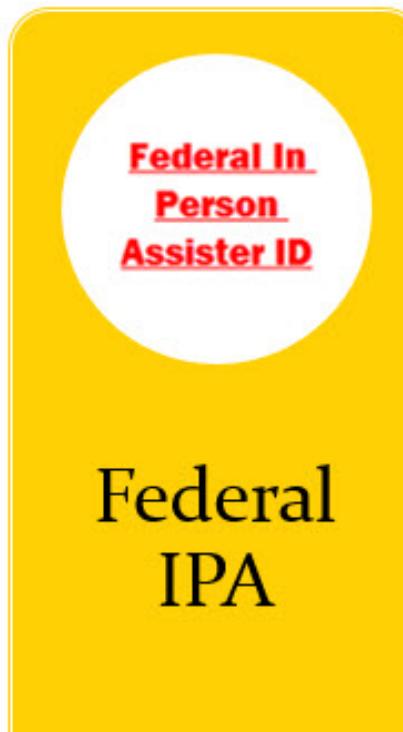
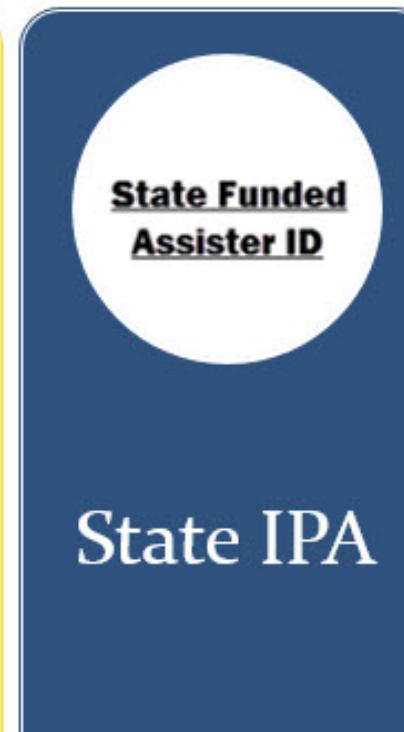
Save/Update

Complete the necessary fields based on your Assister type.

Select Save/Update when complete.

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

 <p>CAC</p> <p>CAC ID Current CAC Training Expiration Date ID</p>	 <p>Navigator</p> <p>Navigator ID</p>	 <p>Federal IPA</p> <p>Federal In Person Assister ID</p>	 <p>State IPA</p> <p>State Funded Assister ID</p>
---	--	--	--

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 the Health Insurance Oversight System (HIOS).

Navigator Recertification

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: *

Navigator ID (Required for Navigator):*

If you completed the full Navigator curriculum last year, indicate that this is not the first time taking Assister training.

The Navigator ID field is completed with the HIOS ID provided separately.

Navigator Recertification

New Navigator - Real (FINAL) (Version : FINAL)

Curriculum for new Navigators
Acquire In 0 Days after registration
Expires In every Year
To acquire this certification, complete all learning elements on the certification path.

Path New Navigators (FINAL)

New Navigators (REQUIRED) REQUIRED

001 Training Overview	002 Health Insurance – Basics	003 Affordable Care Act ACA Basics	004 Marketplace Basics
005 Marketplace Eligibility and Application Assistance	006 Marketplace Affordability and Assistance Programs	007 Marketplace Enrollment and Appeals Assistance	008 Marketplace Exemptions Assistance
009 SHOP Marketplace Assistance	010 Cultural Competence and Language Assistance	View All Items	

Advanced Marketplace Issues (OPTIONAL) Optional

015 Advanced Marketplace Issues

Attachments
No items found.

Register Add to Plans Back

Returning Navigator - Real (FINAL) (Version : FINAL)

Returning Navigator Curriculum
Acquire In 0 Days after registration
Expires In every Year
To acquire this certification, complete all learning elements on the certification path.

Path Returning Navigator (FINAL)

Returning Navigator (FINAL) REQUIRED

014 Privacy, Security, and Fraud Prevention Standards

Advanced Marketplace Issues (OPTIONAL) Optional

015 Advanced Marketplace Issues

Attachments

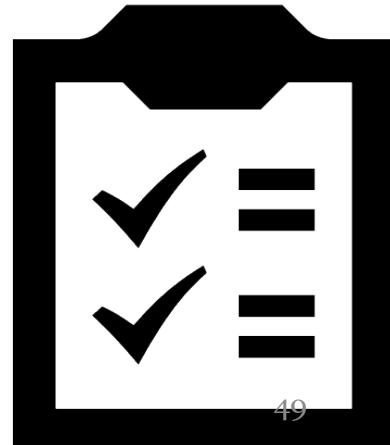
No items found.

Register Add to Plans Back

A returning navigator will only be presented with the courses required of the user. User information maintained by HIOS determines which curriculum is displayed, regardless of what is input in the MLMS profile fields.

Steps to Certificate Completion

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



Accessing the MLMS Steps

See pages 13 – 20.

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 select **Next**
4. Type your Password and then select **Log In**
5. Select **MLMS**, and then select **Training**
6. Update information on the Profile page, and click **Save/Update** or if no changes are made, select **Next**



MLMS Landing Page

The screenshot shows the MLMS Landing Page. At the top left is the Health Insurance Marketplace logo. To its right are icons for user profile, system configuration, and notifications (0). In the top right corner, there is a user profile for Diane Johnson and a "Personalize" link. On the far left, a vertical navigation bar has a "Home" button highlighted with a red box. Below it are links for "Current Learning", "Curriculum Status", and "Training Options". The main content area is divided into several sections: "Assister Announcement" (with a note to check system configuration), "Assister Resources", "Current Learning" (listing a course titled "Training Overview Pilot Course 30Mar2016" located online, marked as "In-Progress" with a "Launch" button), "Curriculum Status" (showing "No items found." and a "All Curriculum" link), "Training Options" (listing three recommendations: "CAC - Mock (FINAL)", "CAC - Real (FINAL)", and "CAC Mock 2017", each with a "Curriculum" type, "(1)CAC" source, "05/30/2016" date, and an "Actions" link), and "Disclaimer" (containing a detailed legal notice about the Centers for Medicare & Medicaid Services' disclaimers regarding the accuracy and liability of the information provided).

Recommendation	Recommendation Type	Sources	Recommended On	Actions
CAC - Mock (FINAL)	Curriculum	(1)CAC	05/30/2016	Actions
CAC - Real (FINAL)	Curriculum	(1)CAC	05/30/2016	Actions
CAC Mock 2017	Curriculum	(1)CAC	05/30/2016	Actions

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

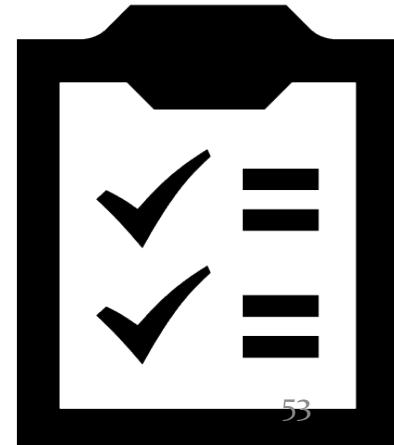
Steps to Certificate Completion

1. Prepare your system
2. Log in to CMS Portal (or Obtain an Enterprise Portal ID)
3. Access MLMS
- 4. Enroll in Curriculum**
5. Complete appropriate training
6. 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**



Step 1: Select Actions and then Enroll

A screenshot of the MLMS Landing page. On the left, there is a 'Training Options' portlet containing a table of training recommendations. On the right, there is a 'Disclaimer' section with a note about CMS disclaimer. A yellow callout bubble with a black border and a black arrow points from the text 'Hover mouse over Actions link, and then select Enroll.' to the 'Enroll' button in the 'Actions' dropdown menu for the first row in the table.

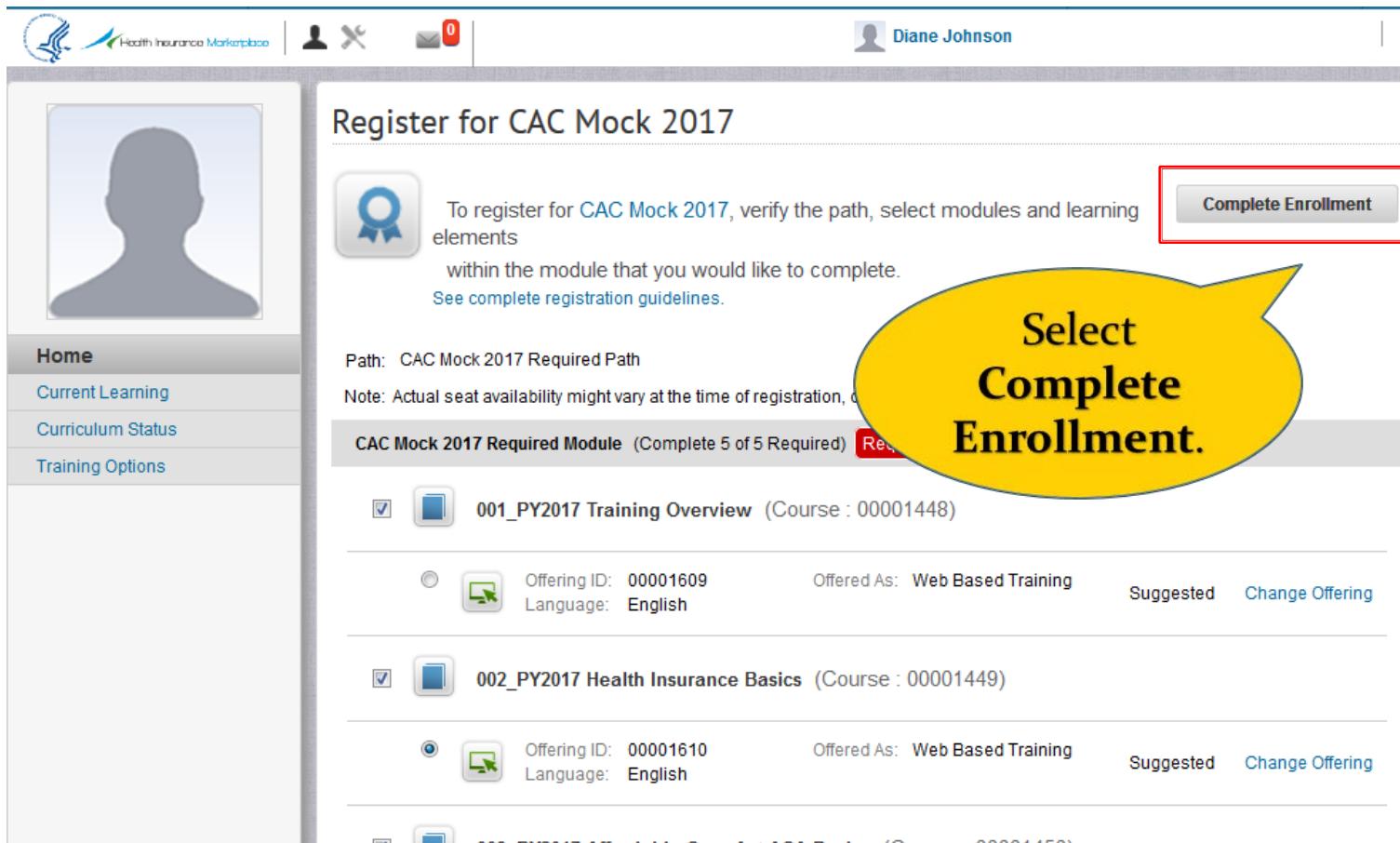
Recommendation	Recommendation Type	Sources	Recomm.	End On	Actions
CAC - Mock (FINAL)	Curriculum	(1)CAC	05/30/2016		Actions Actions
CAC - Real (FINAL)	Curriculum	(1)CAC	05/30/2016		Actions View Detail Enroll
CAC Mock 2017	Curriculum	(1)CAC	05/30/2016		Actions Enroll

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Disclaimer

Look in the **Training Options** portlet on the MLMS Landing page for the curriculum in which to enroll.

Step 2: Select Complete Enrollment



The screenshot shows a user profile for Diane Johnson and a sidebar with navigation links: Home, Current Learning, Curriculum Status, and Training Options. The main content area is titled "Register for CAC Mock 2017". It includes a description of the registration process, a "Complete Enrollment" button (which is highlighted with a red box), and a "CAC Mock 2017 Required Module" section. This section lists three modules with their details: "001_PY2017 Training Overview" (Offering ID: 00001609, Language: English, Offered As: Web Based Training), "002_PY2017 Health Insurance Basics" (Offering ID: 00001610, Language: English, Offered As: Web Based Training), and "003_PY2017 Affordable Care Act ACA Basics" (Offering ID: 00001450, Language: English, Offered As: Web Based Training). A large yellow speech bubble with the text "Select Complete Enrollment." is overlaid on the right side of the module list.

To register for **CAC Mock 2017**, verify the path, select modules and learning elements within the module that you would like to complete.
See [complete registration guidelines](#).

Complete Enrollment

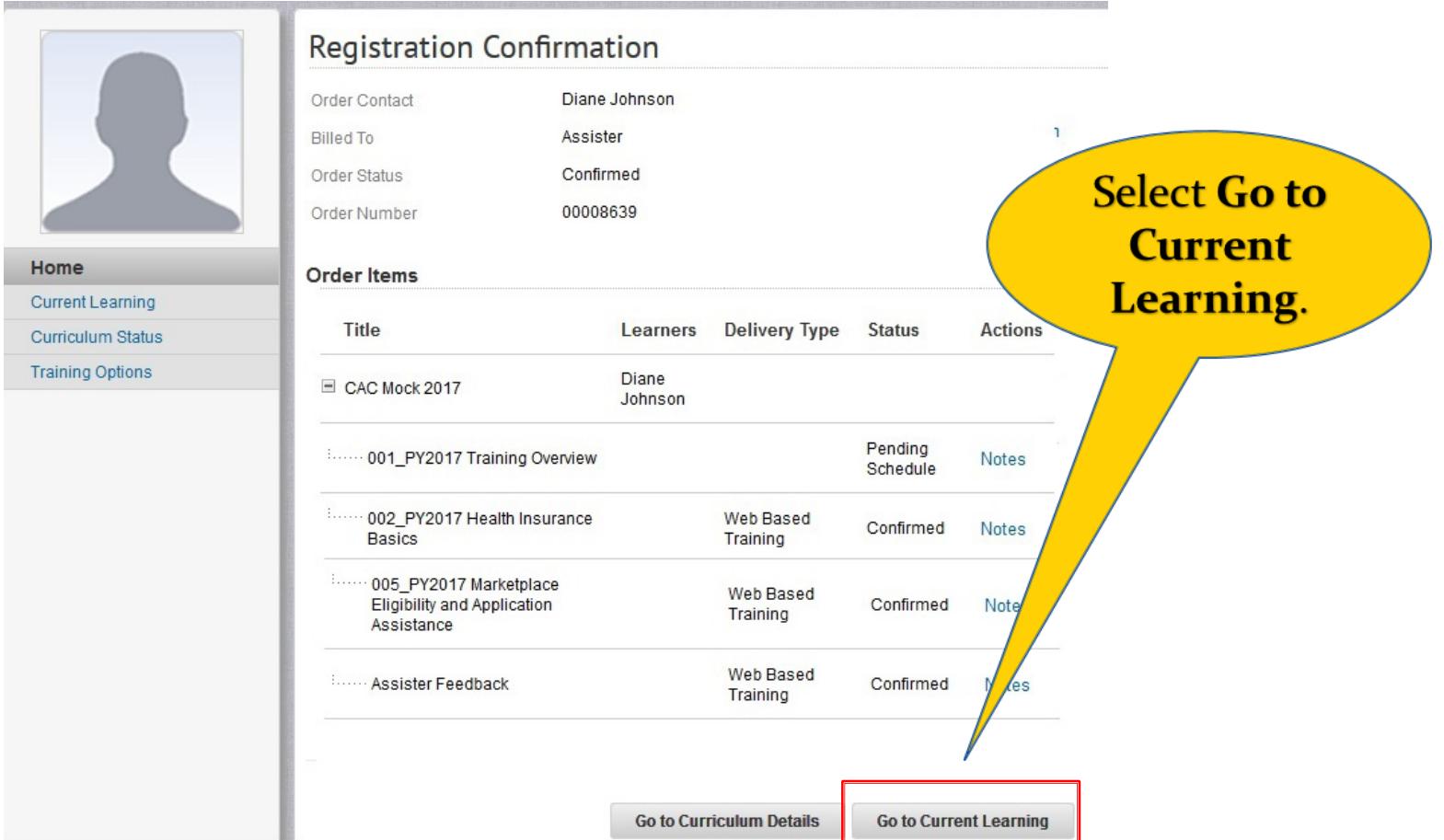
Path: CAC Mock 2017 Required Path
Note: Actual seat availability might vary at the time of registration, contact support for more information.

CAC Mock 2017 Required Module (Complete 5 of 5 Required)

Module	Description	Offering ID	Language	Offered As	Action
<input checked="" type="checkbox"/>  001_PY2017 Training Overview (Course : 00001448)	Offering ID: 00001609 Language: English	Offered As: Web Based Training	Suggested	Change Offering	
<input checked="" type="checkbox"/>  002_PY2017 Health Insurance Basics (Course : 00001449)	Offering ID: 00001610 Language: English	Offered As: Web Based Training	Suggested	Change Offering	
<input type="checkbox"/>  003_PY2017 Affordable Care Act ACA Basics (Course : 00001450)	Offering ID: 00001450 Language: English	Offered As: Web Based Training	Suggested	Change Offering	

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

Step 3: Select Go To Current Learning



Registration Confirmation

Order Contact	Diane Johnson
Billed To	Assister
Order Status	Confirmed
Order Number	00008639

Order Items

Title	Learners	Delivery Type	Status	Actions
CAC Mock 2017	Diane Johnson			
..... 001_PY2017 Training Overview		Pending Schedule	Notes	
..... 002_PY2017 Health Insurance Basics	Web Based Training	Confirmed	Notes	
..... 005_PY2017 Marketplace Eligibility and Application Assistance	Web Based Training	Confirmed	Note	
..... Assister Feedback	Web Based Training	Confirmed	Notes	

[Go to Curriculum Details](#) [Go to Current Learning](#)

Select Go to Current Learning.

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

Step 4: Select Launch

The screenshot shows the 'Current Learning' section of the Health Insurance Marketplace website. A yellow speech bubble with the text 'Select Launch.' points to the 'Launch' button for the first course listed. The 'Launch' button for the second course is also highlighted with a red border.

Name	Status	Actions
001_PY2017 Training Overview (00001609) Duration: 00:00 hours	Confirmed Registration Date: 05/31/2016	View Details Drop Drop and Request Learning
002_PY2017 Health Insurance Basics (00001610) Duration: 00:00 hours	Confirmed Registration Date: 05/31/2016	View Details Drop Drop and Request Learning

Select 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. Log in to CMS Portal (or Obtain an Enterprise Portal ID)
3. Access MLMS
4. Enroll in Curriculum
- 5. Complete appropriate training**
6. Print certificate

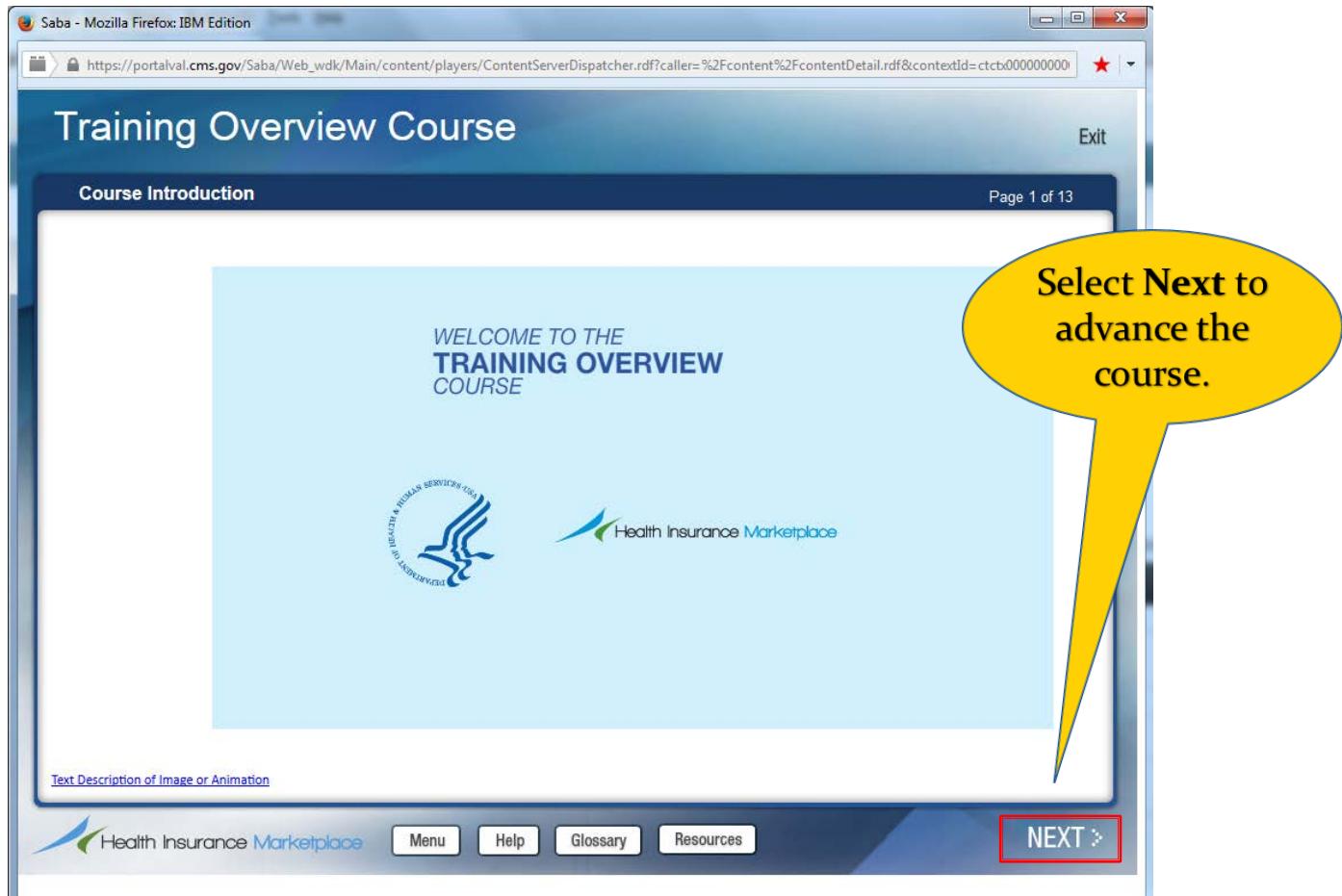


Complete Appropriate Training Steps

1. Select **Next** to advance through the training.
2. On pages that contain key tips, Knowledge checks, and tool tips, you will need to click each link before the **Next** button becomes active.
3. Select **Exit** button on training window 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. 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 2: Select Links

Training Overview Course

Providing Fair, Accurate and Impartial Information

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

Exit

Page 2 of 11



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

Health Insurance Marketplace

Menu Help Glossary Resources

BACK

The **Next** button is not active until all Knowledge Checks, Tool tips and Key tips, etc. on a page have been selected.

Step 3: Select Exit

The screenshot shows a computer screen displaying a training course window titled "Training Overview Course". The window has a blue header bar with the title and a red-bordered "Exit" button in the top right corner. Below the header is a dark blue footer bar with the text "Providing Fair, Accurate and Impartial Information" on the left and "Page 11 of 11" on the right. The main content area features a large compass rose graphic. Inside this graphic, there is a white rectangular box containing the following text:

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 affordable programs for which they are eligible, so that they can choose coverage that meets their budget needs.
- Assisters are responsible for providing assistance that is accessible to all types of consumers, as necessary, referring consumers to resources that can best meet their needs.

Below the "Key Points" list, the text "You've successfully completed this course." is displayed. Underneath that, the instruction "Click **EXIT** to leave the course." is shown. A large yellow speech bubble with a black outline and a yellow arrow pointing towards the "Exit" button contains the text "Select **Exit** to leave the course." The "Health Insurance Marketplace" logo is at the bottom left, and navigation buttons for "Menu", "Help", "Glossary", and "Resources" are at the bottom center. A "BACK" button with a left arrow is at the bottom right.

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 4: Check Completion Status

The screenshot shows the 'Current Learning' section of the Health Insurance Marketplace. On the left, there's a sidebar with 'Home', 'Current Learning' (which is selected), 'Curriculum Status', and 'Training Options'. The main content area displays a course titled '002_PY2017 Health Insurance Basics (00001610)'. It includes a profile picture placeholder, a computer icon, a 5-star rating with '(0 Reviews)', and availability information ('Available From 04/08/2016', 'Language English'). A yellow callout bubble points to the completion status. Below this, a table shows 'Learning Assignments' with two rows: '002 PY2017 Health Insurance Basics' (Successful, Score 100) and '002 PY2017 Health Insurance Basics Assessment' (Successful, Score 100). A red box highlights the 'Completion Status' column of this table. At the bottom right, there are 'Print | Export | Modify Table' options and 'Launch' buttons for each assignment.

Module	Assignment Type	Requirement	Details	Completion Status	Completed On	Actions
002 PY2017 Health Insurance Basics	Training Content	Required	Attempts Allowed: Unlimited Score: 100.00	Successful	05/31/2016	Launch more actions
002 PY2017 Health Insurance Basics Assessment	Training Content	Required	Attempts Allowed: Unlimited Score: 100.00	Successful	05/31/2016	Launch

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

Completing Exams

A screenshot of a web-based assessment interface. The title bar says "Affordable Care Act Basics Assessment". Below it, a section titled "Assessment" shows "Test 1", "SCORE: 100", and "PASSED". In the upper right corner of the main content area, there is a blue "Exit" button with a red border. At the bottom of the screen, a message reads: "You have completed this Assessment. Please click the **EXIT** button in the upper right hand corner of the screen to exit this assessment."

Select Exit.

Most modules include a course and an assessment. Answer all questions on the assessment. Click the **Exit** button when you reach the page with your score.

Steps to Certificate Completion

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



Print Certificate Steps

1. Select **Curriculum Status** 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 a learning management system. At the top, there's a header with a logo, user profile information (Diane Johnson), and navigation icons. Below the header is a main content area titled "Current Learning". The left sidebar has links for Home, Current Learning, Curriculum Status (which is highlighted with a red border), and Training Options. The main content area displays a list of learning items. One item is highlighted with a yellow oval containing the text "Select Curriculum Status.". The item details are: Name - Assister Feedback (00001693, Version: 2017.1), Duration: 00:00 hours, Status - Confirmed, Registration Date: 05/31/2016, Actions - View Details, Drop and Drop Request Learning, and a Launch button. There are also "Hide Learning Assignments" and "Training Content: Feedback" buttons.

After completing all training and assessments for your curriculum, select **Curriculum Status** 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 suggested curriculum, click on the “View All” link below.

Internal

Name Show Required Curriculum Only

Configure | Save Search Query

Internal Curriculum
Showing 1 out of 1 results

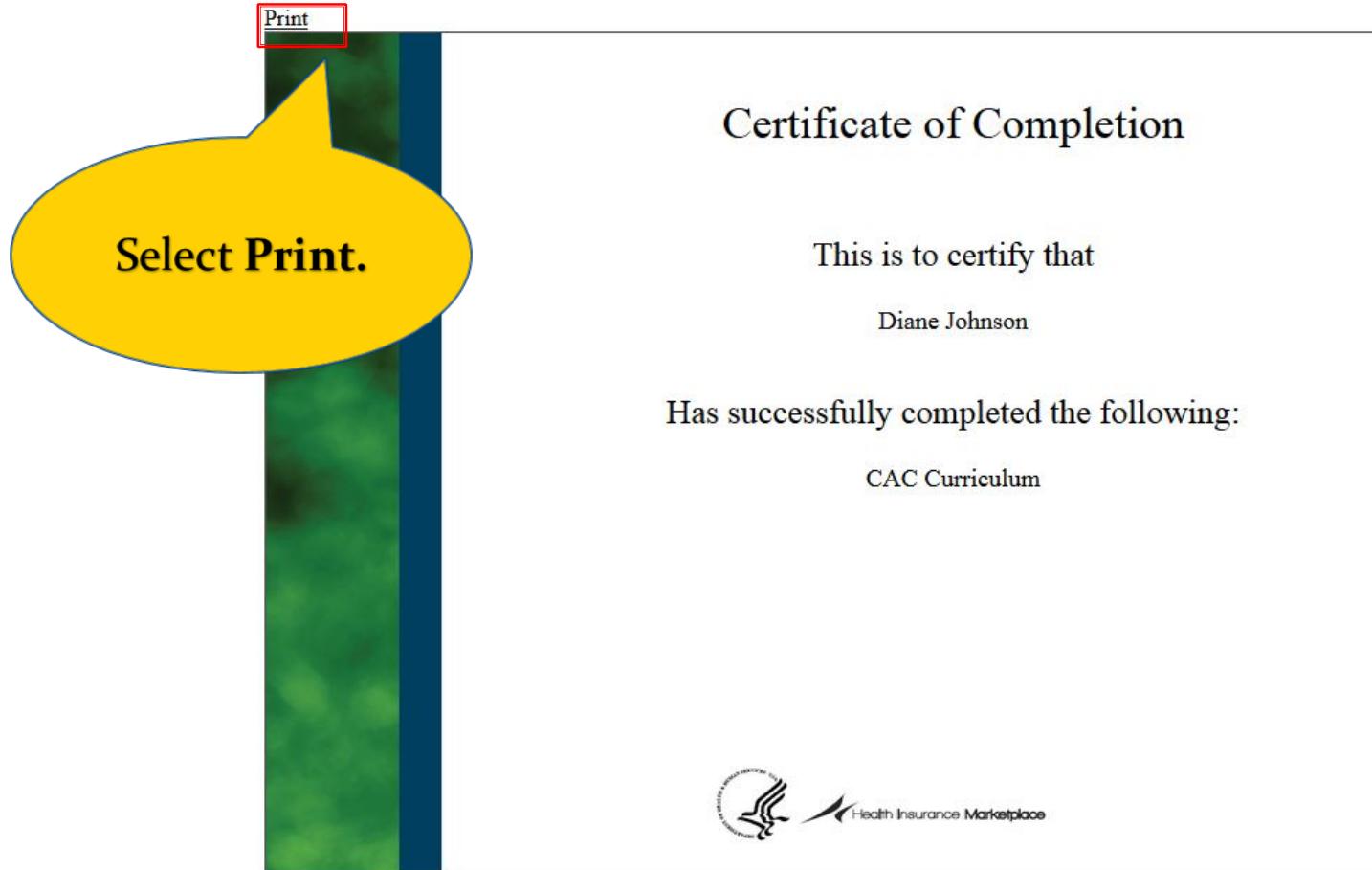
Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assist...	Actions
CAC Mock 2017		CAC Mock 2017 Required Path - 100% Completed	N/A	Acquired	Diane Johnson	Actions

Hover mouse over Actions, and then select Print Certificate.

A yellow speech bubble points to the "Actions" link in the top right corner of the curriculum table, which is then highlighted with a red box. Another red box highlights the "Print Certificate" option in the dropdown menu that appears when the "Actions" link is clicked.

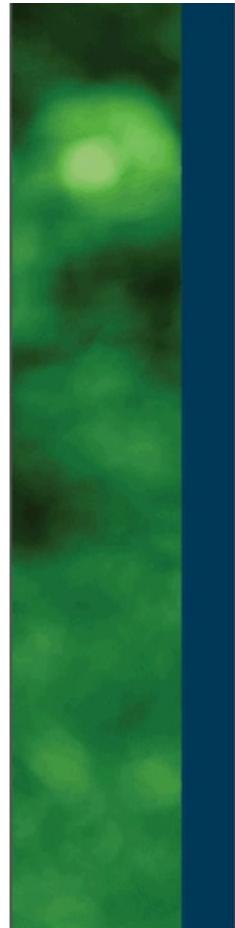
You must complete the entire curriculum in order for the **Print Certificate** option to appear on the curriculum **Actions** list.

Step 3: Print Certificate (CAC)



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 3: Print Certificate (Fed IPA or Navigator)



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)



Kevin J. Counihan,
Chief Executive Officer, Health Insurance Marketplaces
Director, Center for Consumer Information &
Insurance Oversight

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

Re-launch a Completed Course

1. From the MLMS Landing page, select **Curriculum Status** on the left navigation bar
2. Select **Curriculum** name
3. Select **Recent Course History** tab
4. Select **View Results**
5. Select **Launch**
6. Select **Cancel** on the bookmarking window to open the course at beginning



Step 1: Select Curriculum Status

The screenshot shows the Assister Learning Management System interface. On the left, there's a sidebar with a user profile icon and four menu items: Home, Current Learning, Curriculum Status (which is highlighted with a red border), and Training Options. A large yellow callout bubble with the text "Select Curriculum Status." points from the "Curriculum Status" link in the sidebar to the "Curriculum Status" section on the right. The "Curriculum Status" section contains a table with one row:

		Status	Action
	Training Overview Pilot Course 30Mar2016 Location: Online	In-Progress	Launch

Below this, there's a "Training Options" section with a table:

Recommendation	Recommendation Type	Sources	Recommended On	Actions
CAC - Mock (FINAL)	Curriculum	(1)CAC	05/30/2016	Actions

On the right side, there are two more sections: "Assister Resources" and "Disclaimer". The "Assister Resources" section is empty, showing "No items found." The "Disclaimer" section contains the following text:

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Completed modules move from **Current Learning** to the **Curriculum Status** page. To re-launch completed courses, select **Curriculum Status**.

Step 2: Select Curriculum Name

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 suggested Options.

Select Curriculum name from the Internal Curriculum table.

Internal Curriculum
Showing 2 out of 2 result

Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Actions
CAC Mock 2017		CAC Mock 2017 Required Path - 100% Completed	N/A	Acquired	Diane Johnson		Actions

You can re-launch courses from acquired curriculum.

Step 3: Select Recent Course History Tab

The screenshot shows a user profile on the left with a placeholder profile picture. The main content area is titled "CAC Mock 2017". It displays course assignment details: Assigned By (Diane Johnson), Assigned On (05/30/2016), and Status (Acquired). A yellow callout bubble points to the "Recent Course History" tab, which is highlighted with a red border. Below the tabs, there are two view options: "Graphical View" (selected) and "Detailed Status View". The "Path" is listed as "CAC Mock 2017 Required Path". The "Completion Requirement" is "1 of 2 Modules Required", and the "Status" is "Completed".

Select Recent Course History tab.

CAC Mock 2017

Assigned By: Diane Johnson
Assigned On: 05/30/2016
Status: Acquired

Main **Recent Course History** Complete Progress Report

Graphical View Detailed Status View

Path: CAC Mock 2017 Required Path
Completion Requirement: 1 of 2 Modules Required
Status: Completed

CAC Mock 2017 Required Module REQUIRED

Status: **Complete** Progress: 6 of 6 Required Items Completed
Score: 98.583336

001_PY2017 Training Overview
Completed on 05/31/2016

002_PY2017 Health Insurance Basics
Completed on 05/31/2016

003_PY2017 Affordable Care Act ACA Basics
Completed on 05/31/2016

Step 4: Select View Results

The screenshot shows a user profile on the left with a placeholder profile picture. The main content area displays course information for "CAC Mock 2017". The course was assigned by Diane Johnson on 05/30/2016, acquired on 05/31/2016, and has a mastery score of N/A. The status is Acquired, and the expiration date is 08/31/2016. A "More Actions" button is visible. Below this, a navigation bar has tabs for Main, Recent Course History (which is selected and highlighted in green), and Complete Progress Report. A message below the tabs says "View acquisition history for Acquired on 05/31/2016". A large yellow speech bubble with a black outline contains the text "Select View Results." A red rectangular box highlights the "View Results" link for the fourth course item in the table below. The table lists four learning elements completed:

Title	Version	Type	Completed On	View Results
010_PY2017 Cultural Competence and Language Assistance	Required	05/31/2016	View Results	
001_PY2017 Training Overview	Required	05/31/2016	View Results	
002_PY2017 Health Insurance Basics	Required	05/31/2016	View Results	
003_PY2017 Affordable Care Act ACA Basics	Required	05/31/2016	View Results	

Locate the course under the **Title** column that you want to re-launch, and then select **View Results** in the last column.

Step 5: Select Launch

Progress Report for 003_PY2017 Affordable Care Act ACA Basics

You cannot mark this course complete.

Offering Name 003_PY2017 Affordable Care Act ACA Basics

Completion Status Successful Score 100

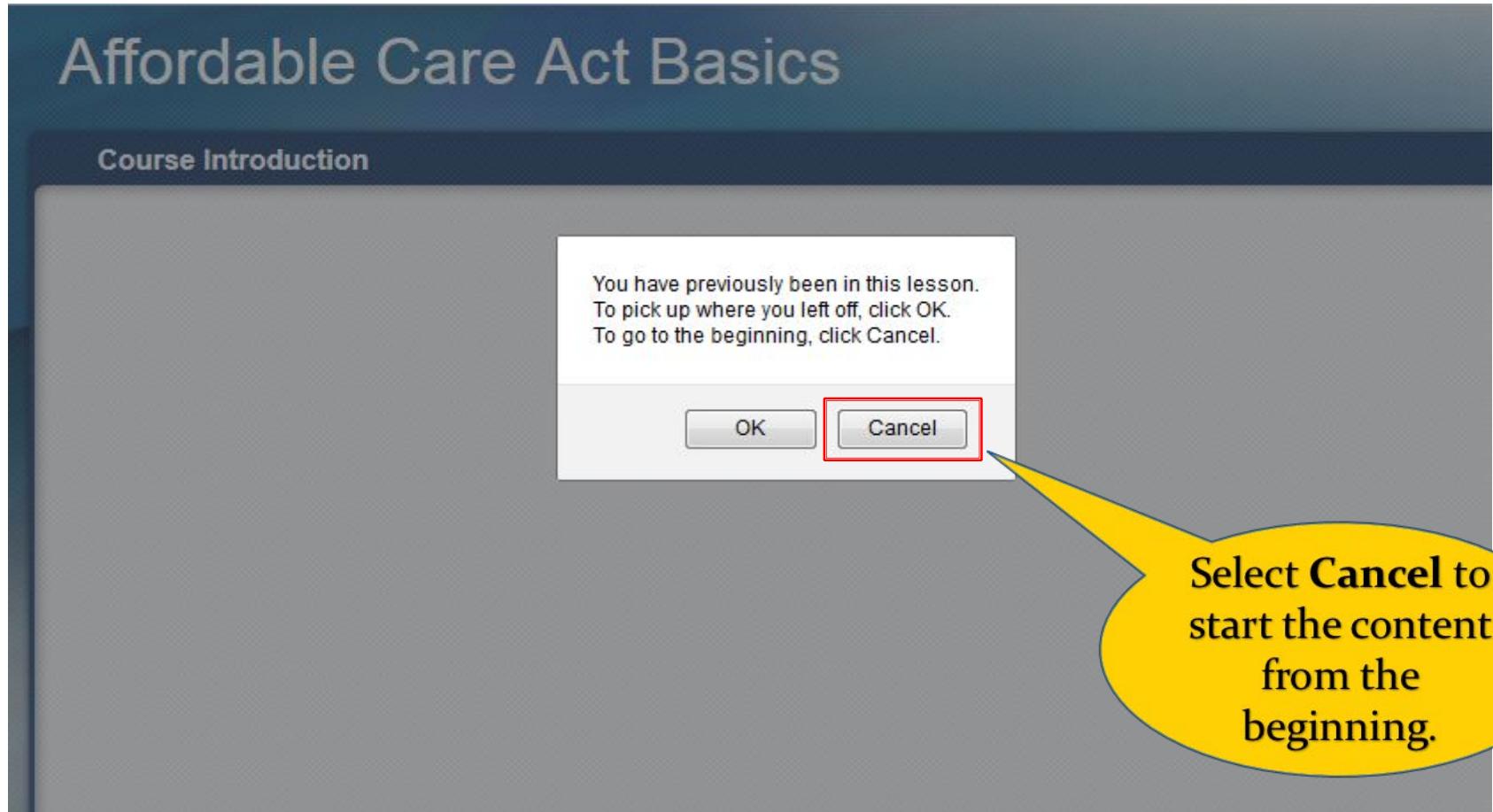
Learning Assignments

Print | Export | Modify Table

Module	Assignment Type	Requirement	Details	Completion Status	Completed On	Actions
003 PY2017 Affordable Care Act ACA Basics	Training Content	Required	Attempts Allowed: Unlimited Score: 100.00	Successful	05/31/2016	Launch more actions
003 PY2017 Affordable Care Act ACA Basics Assessment	Training Content	Required	Attempts Allowed: Unlimited Score: 100.00	Successful	05/31/2016	Launch more actions

Locate the content that you want to re-launch and select the **Launch** button from the **Actions** column.

Course Opens



The training content window appears. The bookmarking message also appears. If you select **OK**, the course opens on the last page of the course.

Viewing MLMS and Curriculum in Spanish

1. Log in as usual and when you reach the MLMS Profile page, select **Spanish** from the **Training Language Selection** drop-down list, and then **OK**.
2. Select **Save/Update**
3. Select **Log Out** to logout of CMS Portal
4. Log in to CMS Portal
5. At the MLMS Profile page, select **Next**



Step 1: Select Spanish

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: *

 Certified Application Counselor (CAC)

Training Language Selection: *

 English English Spanish Year

How Many Years Have You Been
an Assister: *

Select Spanish
from the Training
Language
Selection list.

When Did You Last Complete
Federal Assister Training: *

 This is the first year I'm taking Federal Assister training

Organization Type: *

 Certified Application Counselor (CAC)

When you select **Spanish** (and complete the additional steps), the next time you access the MLMS, the MLMS interface and the curriculum are in Spanish.

Step 2: Select OK

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 require manual entry.

Email:

Assister Type: * Cert Sp

Training Language Selection: * Spanish

How Many Years Have You Been an Assister: * Less than 1 Year

When Did You Last Complete This is the first year I'm taking Federal Assister training

OK

Select OK.

Additional instructions are provided in the warning message.

Step 3: Select Save/Update

Training Language Selection: * Spanish ▾

How Many Years Have You Been an Assister: * Less than 1 Year ▾

When Did You Last Complete Federal Assister Training: * This is the first year I'm taking Federal Assister training ▾

Organization Type: * Certified Application Counselor (CAC) ▾

CAC ID:

Current CAC Training Expiration Date:

Organization Name:

Organization Street Address:

Organization City:

Organization State: -Select One- ▾

Organization Zip Code:

Organization Phone Number:

Select
Save/Update.

Save/Update

Next

At the bottom of the MLMS Profile page is the **Save/Update** button.

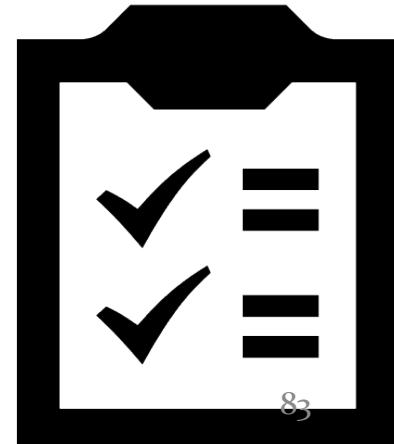
Step 4: Select Log Out

A screenshot of a web browser displaying the Health Insurance Marketplace portal. The top navigation bar includes links for 'Portal Help & FAQs', 'Print', and 'Log Out'. A yellow speech bubble highlights the 'Log Out' button, which is also outlined in red. The main content area shows a user profile picture and the name 'Diane Johnson'. Below the profile, there are sections for 'Assister Announcement' (with a link to 'Check your System configuration') and 'Current Learning'. The right side of the screen shows partial views of other sections labeled 'Ass', 'Cur', and 'Name'.

The MLMS Landing page appears. The information is still in English. You must log out and log back in to the MLMS to see the Spanish language.

Step 5: Log In

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 select **Next**
4. Type your Password and then select **Log In**
5. Select **MLMS**, and then select **Training**



Step 6: Select Next

Training Language Selection: *

Spanish

How Many Years Have You Been
an Assister: *

Less than 1 Year

When Did You Last Complete
Federal Assister Training: *

This is the first year I'm taking Federal Assister training

Organization Type: *

Certified Application Counselor (CAC)

CAC ID:

Current CAC Training Expiration
Date:

Organization Name:

Organization Street Address:

Organization City:

Organization State:

-Select One-

Organization Zip Code:

Organization Phone Number:

Select Next.

Save/Update

Next

This time on the MLMS Profile page, select the **Next** button.

Spanish MLMS

The screenshot shows a user profile for Diane Johnson. The interface is primarily in Spanish. The main menu on the left includes options like 'Inicio', 'Aprendizaje actual', 'Estado Del Curriculo', and 'Opciones De Entrenamiento'. The 'Aprendizaje actual' section lists several learning modules:

Nombre	Estado	Acción
013_PY2017 Customer Service Standards and Community Outreach Ubicación: En línea	En curso	Iniciar
015_PY2017 Advanced Marketplace Issues Ubicación: En línea	En curso	Iniciar
Assister Feedback Ubicación: En línea	En curso	Iniciar
Returning Navigator MOCK	Asignado	Ver detalles

Other sections visible include 'Anuncios Para los Asesores', 'Estado Del Curriculo' (showing 'No se encontraron elementos.'), 'Recursos para los Asesores' (linking to 'CMS Portal Assister'), and 'Opciones De Entrenamiento'.

Notice that the interface is in Spanish. If you originally started curriculum in English, it will still appear in your **Current Learning**.

Completing Assister Feedback

1. From **Current Learning**, select the **Launch** button to begin providing your feedback.
2. Select the **Next** button on the the Assister Feedback main page.
3. Select your curriculum and, then select **Next**.
4. Select **Next** on the Instruction page.
5. The first question appears. Select a feedback response, and then select **Next**.
6. Select **Submit** to complete the Feedback.



Step 1: Select the Launch button.

The screenshot shows the 'Current Learning' section of the Health Insurance Marketplace. On the left, there's a sidebar with links for Home, Current Learning (which is selected), Curriculum Status, and Training Options. The main area displays a list of learning items. One item, 'Assister Feedback (00001693, Version: 2017.1)', is shown with its name, status ('Confirmed'), and registration date ('05/31/20'). Below the item, it says 'Duration: 00:00 hours'. A yellow speech bubble with the text 'Select Launch.' points to the 'Launch' button, which is highlighted with a red border. Other buttons visible include 'View Details' and 'Drop and Drop Request Learning'. At the bottom of the item card, there's a link to 'Hide Learning Assignments ▲' and some status information: 'Training Content: Feedback' and 'Status: Not Evaluated (Unlimited attempts)'.

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

Step 2: Select the Next button.

Assister Survey

Contents

Assister Curriculum
MLMS Assister Training Feedback

Exit

Next



Select Next.

Step 3: Select your curriculum and, then select Next.

Assister Survey
Assister Curriculum

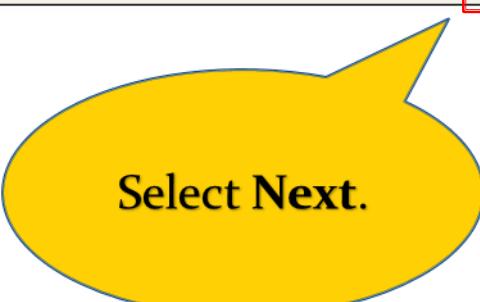
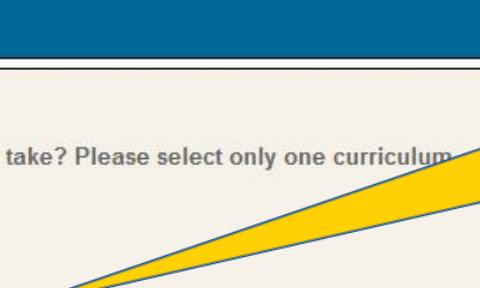
Section #1 of 2
Question #1 of 1

1. Which 2015 Assister curriculum did you take? Please select only one curriculum

- Certified Application Counselor (CAC)
- Federal In Person Assister
- New Navigator
- Returning Navigator
- State Funded Assister

Exit

Next



Select the curriculum you completed.

Select Next.

Step 4: Select Next.

The screenshot shows a software window titled "Assister Survey" with the subtitle "MLMS Assister Training Feedback". On the left, there's a sidebar with "Contents" and links to "Assister Curriculum" and "MLMS Assister Training Feedback". At the bottom left is a blue "Exit" button, and at the bottom right is a blue "Next" button with a red rectangular border around it. A large yellow speech bubble originates from the top right of the window, containing the text "Select Next.".

Assister Survey

MLMS Assister Training Feedback

Contents

Assister Curriculum

MLMS Assister Training Feedback

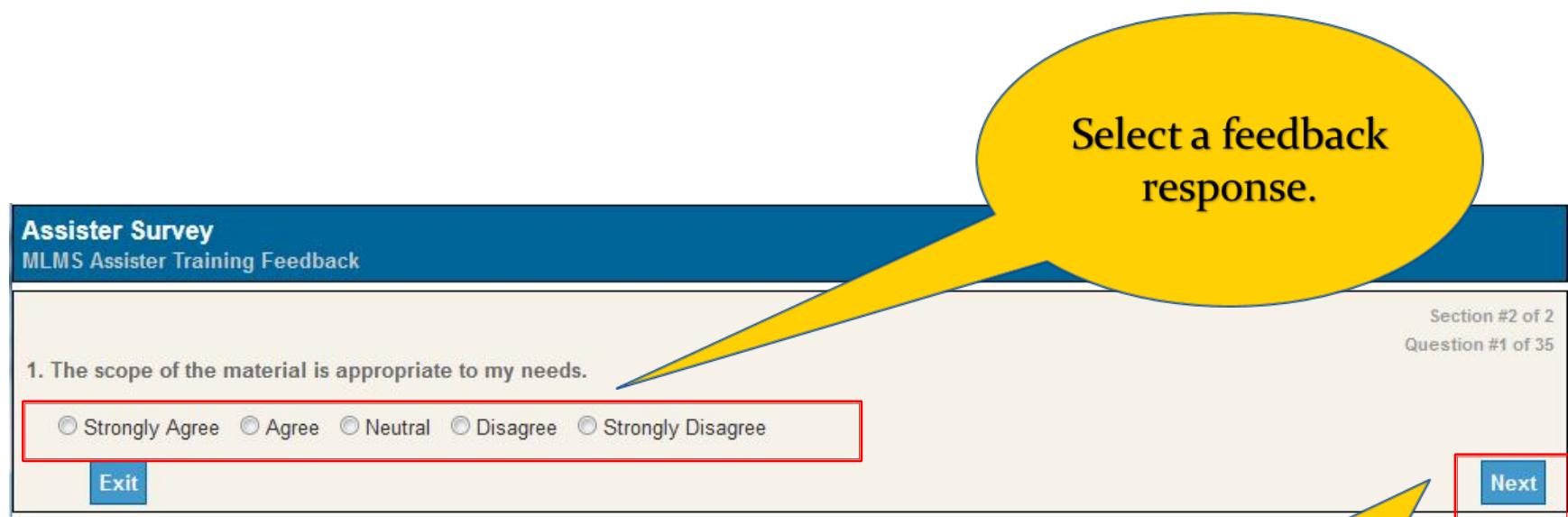
Exit

Select Next.

Next

Feedback instructions are listed on this page.

Step 5: Select a feedback response, and then select Next.



Select a feedback response.

Next

Select Next.

Remember, you can skip any questions you don't want to answer, just select Next without selecting a response. You cannot go backwards.

Step 6: Select Submit to complete the Feedback.

Assister Survey
MLMS Assister Training Feedback

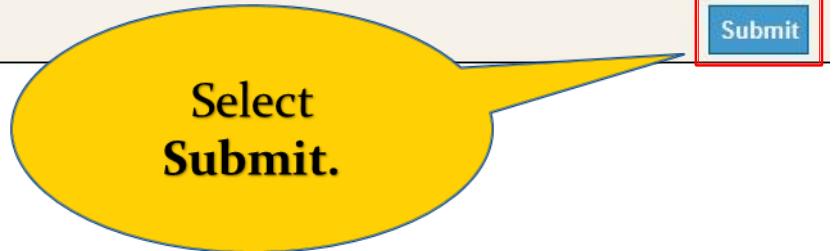
Section #2 of 2
Question #35 of 35

35. The following training feature would be useful to understand the training material: More in-depth assister certification training.

Strongly Agree Agree Neutral Disagree Strongly Disagree

[Exit](#)

[Submit](#)



When you reach the last statement in the Feedback, the **Submit** button is displayed. Select **Submit** to complete the Feedback.

MLMS Assister Feedback Reminders

- Select Assister Feedback by locating it in your **Current Learning** and selecting **Launch**.
- After beginning the Assister Feedback, select the curriculum name for which you are providing feedback.
- Skip questions that don't apply by selecting **Next**.
- You can only go forward once you start the Assister Feedback. Select **Exit** and start over if you've made a mistake.
- You must select **Submit** on the last question page to ensure your answers are saved in the MLMS.



Launch of Plan Year 2017 FFM Assister Training

*System Requirements
and Reminders*

*Jabaar Gray
July 6, 2016*



Topics

- Browser Types
- QRGs /FAQs
- 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

- **Note:** 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.
- USE one of the following Browsers:



Clear Browser Cache

If you are having issues, clearing the cache of your browser sometimes clears up the problem. Below are links to the browser's instructions for clearing the cache.

- [Chrome Instructions](#)
- [Firefox Instructions](#)
- [Internet Explorer 10 Instructions](#)

QRGs and FAQs

- QRGs – Quick Reference Guides (QRGs) are available on the CMS Training for navigators, agents, brokers, and other assisters website.
 - <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html>



QUICK REFERENCE GUIDE: PLAN YEAR 2017

Computer Configuration Requirements

The purpose of this document is to provide a quick overview for preparing your system for the functional requirements of the MLMS. The MLMS works best with Chrome or Firefox. For the best performance, we highly recommend using one of these web browsers. Open a web browser in Firefox, Chrome, or Internet Explorer.



QUICK REFERENCE GUIDE: PLAN YEAR 2017

FFM REGISTRATION AND TRAINING STEPS FOR ASSISTERS

The purpose of this document is to provide a quick overview for Assistors on how to access and register in the Marketplace Learning Management System (MLMS). The MLMS is specifically designed to provide both one-time and continuous on-line training. When completing the initial registration process, pay close attention to the navigation instructions provided in this guide. Open a web browser in Internet Explorer 10, Firefox (45.1.1), or Chrome (50.0.2661.102 m).

QRGs and FAQs

- FAQs – The Frequently Asked Questions (FAQs) document is available on the CMS Training for navigators, agents, brokers, and other assisters website. It is also available on the MLMS Landing page and on the pop-up Help Desk window in the MLMS.
 - <https://marketplace.cms.gov/technical-assistance-resources/training-materials/mlms-questions.PDF>

Marketplace Learning Management System (MLMS) Frequently Asked Questions (FAQs)

- English
- Spanish

Help

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: 9AM - 5PM EST

[Assister FAQ Click here](#)

While we research your inquiry – try the FAQs!!
[For Agent/Broker FAQ click here](#)
For Assister FAQ [click here](#)

User Name *	Diane Johnson
User Email *	dkjohn@us.ibm.com
User Type *	Agent Broker
Subject*	Logging In
Message*	

Preparing Your System

1. JavaScript needs to be enabled for successful use of the Enterprise Portal.
 - <http://enable-javascript.com/>
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. 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, use the support link listed below for pop-up blockers [Chrome Instructions](#) / [Firefox Instructions](#) / [Internet Explorer](#)

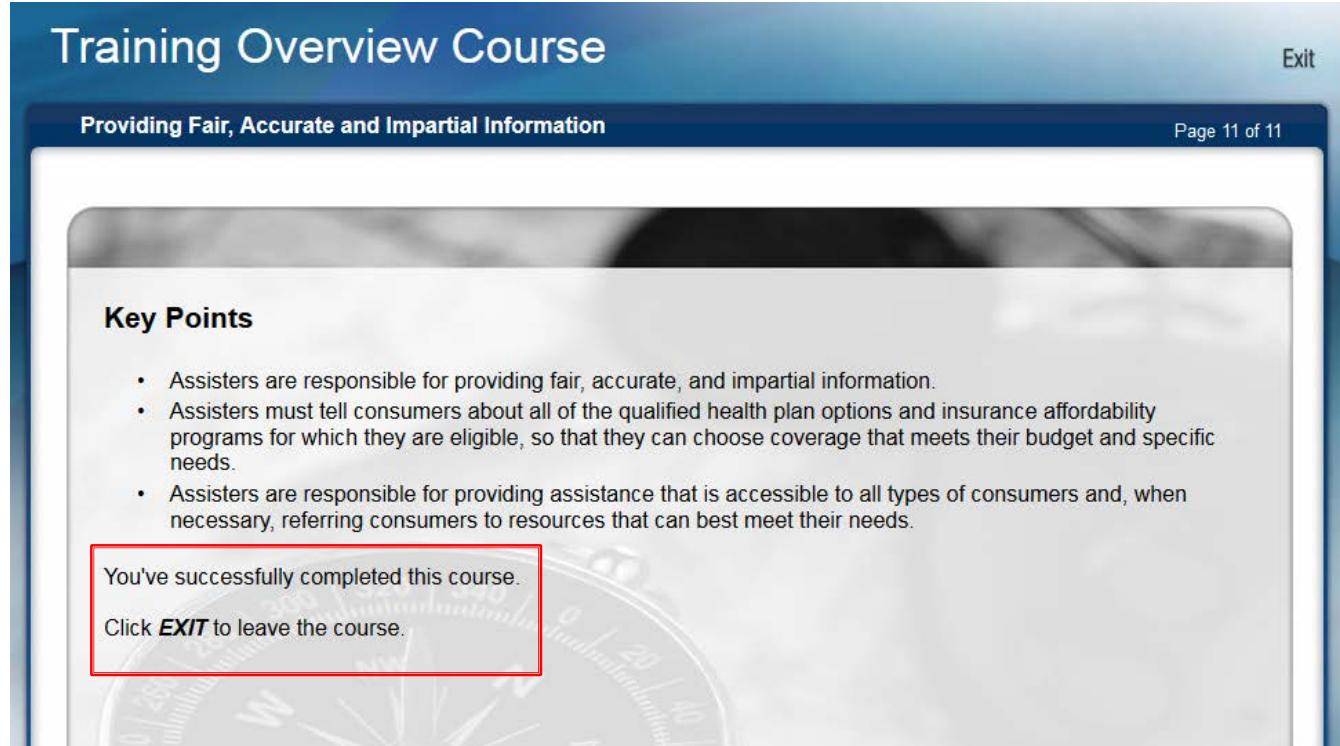
Home or Public Computer

- 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 clear your cache, or log back in twice in order to see the **MLMS > Training** link on your CMS 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. Navigate to **Curriculum Status** verify status. Hover your mouse over the **Actions** link for the curriculum and select **View Course History**.

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, [Training Options](#).

Internal

Name Show Required Curriculum Only

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

Internal Curriculum
Showing 2 out of 2 results

Name	Version	Selected Path (% Complete)	Mastery Score	Status	Assessor	Actions
CAC Mock 2017		CAC Mock 2017 Required Path - 100% Completed	N/A	Acquired	Diane Johnson	View Curriculum History View Course History Print Certificate View Course History

Enroll in Optional Courses

- To enroll in another curriculum that contains the optional courses perform the following steps:
 1. Log in to CMS Portal and on the MLMS Profile page, change your Assister Type to “**Other**” and then select the **Save/Publish** button.
 2. From the Training Options portlet, select **Action** and then **Enroll** for either the State IPA, Federal IPA, or New Navigator curriculums.
 3. Select **Complete Enrollment**
 4. Select **Go to Current Learning**
- The optional courses you did not take as part of the CAC curriculum will now appear in **Current Learning**.

Help Desk Assistance

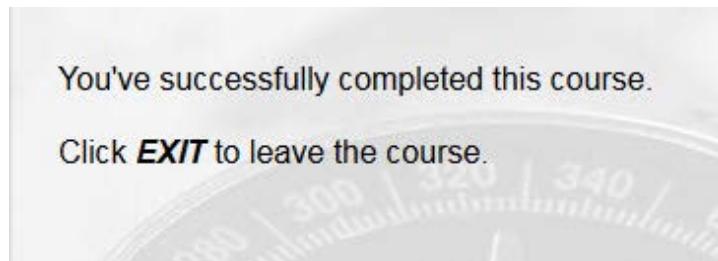
- If you encounter an error, or your course doesn't show complete even though you completed a course, open a ticket with the Help Desk
- Select the **Check your System Configuration** link on the MLMS Landing page. Send a screenshot of the information to the Help Desk.
- Include in your ticket the following information:
 - Print screens
 - Third party security software installed
 - Is Flash installed

Remember To

- For the best performance, use Firefox, Chrome, Internet Explorer 10 or lower 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. Send a screenshot of your computers **Check your System Configuration** page.

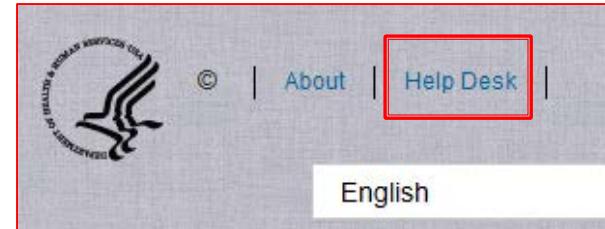
Final MLMS Don'ts

- 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. You can use **Back** within the training content window.
- Session Timeout - Don't get distracted while taking training. The Enterprise portal/MLMS will time out in **30 minutes** when no activity is present.
- The course is not finished until you see the following 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?

