

**Steps for Accessing and Completing Marketplace Enrollment Assister Training¹
Tribal Premium Sponsorship Program (TPSP)**

May 14, 2017

This memorandum seeks to provide guidance to Tribal Premium Sponsorship Program (TPSP) enrollment specialists on the steps needed to complete Marketplace assister training offered by the federal Centers for Medicare and Medicaid Services (CMS). The CMS training is offered through the Web-based Marketplace Learning Management System (MLMS). In states with a Federally-Facilitated Marketplace (FFM), individuals who provide application and enrollment assistance related to health insurance or insurance affordability programs do *not* have to become certified application counselors (CACs) or receive designation by the Marketplace to provide these services.² Nonetheless, individuals not certified as application counselors still can complete the CAC training modules, which CMS expects to help many types of organizations and assistance personnel provide Marketplace-related education and application and enrollment assistance.³

Individuals who seek to complete the CAC training modules can do so by registering for MLMS through the CMS Enterprise Portal Web site. Of the 15 available training modules (listed below), those seeking CAC certification must complete seven of them (noted with asterisks); the other modules are recommended but not required. CMS estimates that the CAC training modules will take 5-10 hours to complete and that the full suite of modules will take 20 hours to complete.

- Training Overview*
- Health Insurance Basics
- Affordable Care Act Basics
- Marketplace Basics
- Marketplace Eligibility and Application Assistance*
- Marketplace Affordability and Assistance Programs*
- Marketplace Enrollment and Appeals Assistance (includes information on redeterminations)*

¹ This brief is for informational purposes only and is not intended as legal advice. For questions on this brief, please contact Doneg McDonough at DonegMcD@Outlook.com.

² Individual states might have implemented additional requirements on individuals assisting with enrollment through a Marketplace. For example, Montana enacted HB 250, which gives authority to the relevant state officials to design and implement additional requirements on individuals who provide assistance with Marketplace enrollment. Section 3(5) of HB 250 reads: “Section 3. Commissioner's duties—navigator certification and training program—training for certified application counselors and others ... (5) The commissioner *may* prescribe training for an application counselor provided for in federal rule and other persons who while not part of the navigator program assist those who sign up for an exchange. The commissioner may require completion of the training before certification by the exchange. The training must be designed for those who assist applicants seeking to enroll in coverage through the exchange.” (Emphasis added.) A review of the Office of the Montana State Auditor Web site indicates that the state imposes additional requirements for individuals seeking certification as an application counselor but does not indicate any such requirements for individuals providing Marketplace application and enrollment assistance without obtaining certification. See <http://csimt.gov/insurance/marketplace-certification/>.

³ It is important to note, however, that completing the CAC training modules does not certify an individual as a CAC; only CAC-designated organizations (CDOs) can confer certification. In addition, individuals not certified as application counselors cannot present themselves to the general public as a CAC.

Attachment J: Generic-Steps for Accessing Marketplace Assister Training

- Marketplace Exemptions Assistance*
- SHOP Marketplace Assistance*
- Cultural Competence and Language Assistance
- Serving Vulnerable and Underserved Populations
- Working with Consumers with Disabilities
- Customer Service Standards and Community Outreach
- Privacy, Security, and Fraud Prevention Standards*
- Advanced Marketplace Issues

The steps for registering for MLMS through the CMS Enterprise Portal Web site and completing the CAC training modules appear in the table below. To begin the process, open a Web browser in Chrome, Firefox, Internet Explorer, or Safari.⁴

Steps for Registering for MLMS and Completing CAC Training Modules for 2016

Registering for MLMS	
1.	Access the CMS Enterprise Portal at https://portal.cms.gov/ .
2.	To begin creating a CMS Enterprise Portal User ID, click on the “New User Registration” link.
3.	Read and check the box to signify agreement with “Terms and Conditions,” then click “Next.” (NOTE: You do not need to provide a Social Security Number).
4.	Complete all fields on the “Your Information Page,” then click “Next.”
5.	Create a User ID and Password.
6.	Complete “Challenge Question 1” (choose a question from the box and provide an answer in the “Answer 1” box) and repeat this process for Questions and Answers 2 and 3.
7.	Click “Next.”
8.	After the message “Account Successfully Created” appears, click “OK.”
Completing CAC Training Modules	
<i>Requesting Access to MLMS</i>	
1.	Click “Login to CMS Secure Portal.”
2.	Read the “Terms and Conditions,” then click “I Accept.”
3.	Enter your User ID and Password.
4.	Click “Log In.”
5.	Click “Request Access Now.”
6.	Type “FFM” in the Access Catalog search box.
7.	Click “Request Access” in the box that appears.
8.	Select “Assisters” from the list of roles, then click “Submit.”
9.	After the “Successful Completion!” message appears, click “OK”

⁴ CMS recommends using Chrome or Firefox for optimal performance. Other computer configuration requirements and recommendations are available at <https://marketplace.cms.gov/technical-assistance-resources/training-materials/2017-quick-reference-guide-computer-requirements.PDF>.

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10.	Click "Log Out."
<i>Accessing MLMS</i>	
1.	Click "Login to CMS Secure Portal."
2.	Read the "Terms and Conditions," then click "I Accept."
3.	Enter User ID; enter Password
4.	Hover over the "MLMS" menu (gold tab) and select "Training."
5.	Complete the necessary fields based on your assister type (NOTE: In the "Assister Type" field, you should select "Other" if you are not seeking formal certification as a CAC).
6.	Click "Save/Update"
7.	Click "Next."
<i>Navigating the "Learner's Landing Page"</i>	
1.	In the "Training Options" menu, hover over the "Actions" link for your assister type (CAC) and click "Enroll."
2.	After the "Register for 2017 Plan Year Certified Application Counselor (CAC)" page appears, check the boxes for all of the required modules, then click "Complete Enrollment."
3.	After the "Registration Confirmation Page" appears, click "Go to Current Learning" near the bottom of the web page.
4.	Click "Launch" next to the first training module to begin training.
5.	Complete this training module and all of the remaining modules in the curriculum (NOTE: You do not have to complete all of the modules in one session).

Additional Information

- A quick reference guide on using the CMS Enterprise Portal Web site is available at <https://marketplace.cms.gov/technical-assistance-resources/training-materials/2017-quick-reference-guide-assister-training.PDF>.
- A PowerPoint presentation on using the CMS Enterprise Portal Web site is available at <https://marketplace.cms.gov/technical-assistance-resources/training-materials/2017-launch-ffm-assister-training.pdf>.
- A series of YouTube videos on using the CMS Enterprise Portal Web site is available at <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html>.
- All of the content of the CAC training modules is available at <https://marketplace.cms.gov/technical-assistance-resources/cac-training-courses.zip>.
- Additional resources for Marketplace assisters are available at <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html>.
- Indian-specific Marketplace information (PowerPoint presentations, brochures, flyers, posters, fact sheets, etc.) is available at <https://www.cms.gov/Outreach-and-Education/American-Indian-Alaska-Native/AIAN/Outreach-and-Education-Resources.html>.

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