

## **Attachment J: Generic Steps for Accessing Marketplace Assister Training**

### **Steps for Accessing and Completing Marketplace Enrollment Assister Training: Tribal Premium Sponsorship Program (TPSP)<sup>1</sup>**

**February 5, 2023**

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.<sup>2</sup> 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.<sup>3</sup>

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 12 available training modules (listed below), those seeking CAC certification must complete 8 of them (noted with asterisks); the other modules are optional. CMS estimates that the required CAC training modules will take 6-7 hours to complete.

- Training Overview\*
- Health Coverage Basics\*
- Affordable Care Act Basics\*
- Privacy, Security, and Fraud Prevention Standards\*
- Marketplace Assister Essentials\*
- Serving Vulnerable and Underserved Populations\*
- Cultural Competence and Language Assistance\*
- Working with Consumers with Disabilities\*
- Customer Service Standards and Community Outreach
- Coverage to Care Assistance
- Assister Standard Operating Procedures
- Advanced Marketplace Issues and Technical Support

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<sup>1</sup> 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.

<sup>2</sup> Individual states might have implemented additional requirements on individuals assisting with enrollment through a Marketplace.

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

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 Google Chrome, Firefox, or Microsoft Edge.

**Steps for Registering for MLMS and Completing CAC Training Modules for 2023**

<b>Registering for MLMS</b>	
1.	Access the CMS Enterprise Portal log-in page at <a href="https://portal.cms.gov/">https://portal.cms.gov/</a> .
2.	To begin creating a CMS Enterprise Portal User ID, click on “New User Registration.”
3.	From the Choose Your Application drop-down menu, select “Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access.”
4.	Read and check the box to signify agreement with Terms & Conditions, then click “Next.”
5.	Complete all fields on the Register Your Information page, then click “Next.”
6.	Create a User ID and Password.
7.	Complete Security Question and Security Answer (choose a question from the first box and provide an answer in the second box)
8.	Click “Next.”
9.	Review your information, then click “Submit User.”
10.	After the confirmation page opens, click “login” to access the log-in page.
<b>Completing CAC Training Modules</b>	
<i>Requesting Access to MLMS</i>	
1.	Access the CMS Enterprise Portal log-in page.
2.	Enter your User ID and Password.
3.	Check the box to signify agreement with “Terms & Conditions.”
4.	Click “Login.”
5.	From the Register Multi-Factor Authentication (MFA) Device drop-down menu, select an MFA method, which you will use each time you log into the system
6.	Provide any additional required information, then click “Send MFA Code.”
7.	After you receive the MFA code, enter the code in the “Enter Code Received” box and click the “Add Device” button.
8.	On the My Portal page, click “here.”
9.	On the Request Application Access page, select “Assisters” from the Select a Role drop-down menu, then click “Next.”
10.	Complete the Identity Verification process.
11.	Enter a Reason for Request in the dialog box and click “Submit.”
12.	After you receive confirmation, click “OK.”
<i>Accessing MLMS</i>	
1.	Click on the “My Apps” tab on the ribbon at the top of the page and select “MLMS Training.”
2.	Select your assister type (Other) and click “Save” to access the MLMS Assister landing page.
<i>Navigating the MLMS Assister Landing Page</i>	
1.	Access the MLMS Assister landing page.

2.	In the Training Options section, select the curriculum you wish to complete (PY 2023 Assister - Other).
3.	Click the “Open Curriculum” button to access the training modules.
4.	Click the “Launch” button 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/ffm-registration-and-id-verification.pdf>.

All of the content of the CAC training modules is available at <https://marketplace.cms.gov/technical-assistance-resources/training-materials/certified-application-counselor-training-courses.html>.

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>.