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

ASSISTER FAQS

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GENERAL/TROUBLESHOOTING

1. **What do I do if I do not have a CMS Portal User ID to access the CMS Enterprise Portal?**
   ANSWER: If you have not done so, you must create an account for the CMS Portal following these steps:
   1. Navigate to the CMS Enterprise Portal via portal.cms.gov
   2. Click the "New User Registration" link.
   3. Click the "I agree to Terms and Conditions" check box and select the "Next" button.
   4. Enter valid data in all the mandatory fields and select the "Next" button.
   5. Enter the valid User ID and password, then choose challenge questions and answers and select the "Next" button.
   6. Click the "OK" button. (Wait five (5) minutes and then proceed to step 7.)
   7. Click the "Login to CMS Secure Portal" hyperlink on the CMS Portal Landing page.
   8. Click the "I Accept" button on the "Terms and Conditions" page.
   9. Enter valid User ID and select the "Login" button.
   10. Enter valid Password and select the "Login" button.
   11. Select the "My Access"/"Request Access Now" button on the CMS Portal Home page.
   12. Enter "FFM" in the search box (OR) select "SHOW ALL" button.
   13. Select "Request Access" button on the "FFM/Training-Agents/Brokers/Assisters" tile.
   14. Select "Role" drop down list.
   15. Select "Assisters" from the "Role" drop down list.
   16. Click the "Submit" button.
   17. Log out of the CMS Portal (First time Assister requests must do this before accessing the MLMS).

2. **How do I access the Marketplace Learning Management System (MLMS)?**
   ANSWER: To access the MLMS and complete training, follow these steps:
   a. Click the "Login to CMS Secure Portal" hyperlink on the CMS Portal Landing page.
   b. Click the "I Accept" button on the "Terms and Conditions" page.
   c. Enter valid User ID and select the "Next" button.
   d. Enter valid Password and select the "Login" button.
   e. Click the yellow button at the upper left of the screen that says "MLMS."
   f. Click on "Training."
   g. Fill out the necessary information on the Assister profile landing page.
   h. Click "Continue" and enter the MLMS.

3. **How do I enroll in a curriculum?**
   ANSWER: Navigators will be presented with either the refresher or full curriculum depending on their activity in Plan Year 2016. All other assisters will need to take the full curriculum. Returning Navigators may enroll in the full curriculum if they prefer that to the refresher curriculum. To enroll in a curriculum, follow these steps:
   a. On the MLMS assister landing page, look for the "Training Options" section.
   b. Identify the curriculum you wish to enroll in, and hover your cursor over the "Actions" link to the right of that curriculum.
   c. In the bubble that appears, select the "Enroll" button.
   d. Then select the "Complete Enrollment" button.
   e. Select the "Go to Current Learning" button at the bottom of the MLMS Assister landing page.
   f. You may start the curriculum's courses by selecting the "Launch" button next to each course.

4. **How do I change/reset my MLMS User ID?**
   ANSWER: In order to change your CMS portal (MLMS) user ID, complete the following steps:
   a. Visit the CMS Enterprise Portal via portal.cms.gov.
   b. On the right side of the site, click on the "Forgot User ID" link under the CMS Secure Portal pane.
   c. Follow the on-screen instructions.
   If you need further assistance, please contact XOSC Tier 1 support at 1-855-267-1515 or CMS_FEPS@cms.hhs.gov. It is important to retain the originally created User ID to ensure a complete assister record.

5. **How do I change/reset my MLMS password?**
   ANSWER: In order to change your CMS portal (MLMS) password, complete the following steps:
   a. Visit the CMS Enterprise Portal via portal.cms.gov.
   b. On the right side of the site, click on the "Forgot Password" link under the CMS Secure Portal pane.
   c. Follow the on-screen instructions.

   If you need further assistance, please contact XOSC Tier 1 support at1-855-267-1515 or
   CMS_FEPS@cms.hhs.gov

6. **How do I change change/reset my password when I do not remember the answer to my security question?**
   ANSWER: Contact XOSC Tier 1 support at 1-855-267-1515 or CMS_FEPS@cms.hhs.gov

7. **What do I do if I accidentally chose the wrong CMS Portal user role?**
   ANSWER: If you are an assister and you chose the role of agents & brokers, please contact the Exchange Operations Support Center via email at CMS_FEPS@cms.hhs.gov or telephone at 1-855-CMS-1515 and report that you are an assister who has chosen the wrong role and that EIDM needs to change your role to assister.

8. **What is multi-factor authorization (MFA) and how do I set it up and use it to log into the CMS Portal?**
   ANSWER: MFA is an approach to security authentication which requires users of a system to provide more than one form of verification in order to prove their identity and be allowed access to the system. It includes verification by something a user knows (such as a password) and something a user has (such as a security token), before gaining access to an online application. For more information navigate to https://questions.cms.gov/ and enter "MFA" in the search box. More details and training materials are found here.

9. **Why does the system log out automatically?**
   ANSWER: An inactivity warning is given after 28 minutes of inactivity. After 30 minutes without activity, the system will automatically log out for privacy and security purposes. In order to keep from being logged out automatically, maintain some level of activity on your computer. Course content that you are currently viewing may not be registering with the MLMS system after the CMS system logs out.

10. **Can I use a mobile device to take training?**
    ANSWER: At this time, mobile devices cannot be used to complete training on the MLMS.

11. **I am getting a course loading error. What do I do?**
    ANSWER: This may be due to your web browser. Ensure that you have the latest version of your web browser. We recommend using Firefox, Google Chrome, or Internet Explorer 10. You can also try refreshing your browser. If the problem persists, contact the Help Desk at MLMSHelpDesk@cms.hhs.gov or by clicking the Help Desk link at the bottom of the MLMS page. Be sure to include your error message in your email to the Help Desk. You can also run a check of your computer settings by using the "Check your system configuration" link found in the "Assister Announcement" section of the MLMS Assister landing page. Provide a screenshot of the results of the system check with your help ticket.

12. **What do I do to when my course is frozen?**
    ANSWER: Try exiting the training and launching the course again. Your training progress will not be lost if you use the "Exit" button on the Training window instead of closing the browser. It will be bookmarked so that you can resume your training from where you left off. You can also try restarting your computer. If the problem persists, contact the Help Deskat MLMSHelpDesk@cms.hhs.gov or by clicking the Help Desk link at the bottom of the MLMS page. You can also run a check of your computer settings by using the "Check your system configuration" link found in the "Assister Announcement" section of the MLMS Assister landing page. Provide a screenshot of the results of the system check with your help ticket.

13. **How can I get help for the Marketplace Learning Management System   (MLMS)?**
    ANSWER: Please contact the MLMS Help Desk at MLMSHelpDesk@cms.hhs.gov or by clicking the Help Desk link at the bottom of the MLMS page.

14. **Why do I see a redirect screen when navigating to the MLMS?**

    ANSWER: When using Internet Explorer 11 and moving from the Profile page to the MLMS landing page a user may see a middle step indicating that they are being redirected to the MLMS. If the user is not automatically moved to the MLMS landing page, simply select the **Next** button at the bottom of the page.

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USER PROFILE

1. **How do I edit my MLMS profile information? (email address, user type, etc.).**

    ANSWER: You may edit profile information for the Marketplace Learning Management System (MLMS) on the MLMS Welcome to the MLMS assister profile page, which you will land on first every time you log in to the MLMS. Click the Save/Update button after making changes to your profile. If the changes include updating your Training Language Selection it is necessary to log out and then log back in again to complete the update. If you have additional questions or concerns with editing your profile information, please contact the Help Desk at MLMSHelpDesk@cms.hhs.gov or by clicking the Help Desk link at the bottom of the window while logged into the MLMS.

2. **Do I have to enter profile information?**

    ANSWER: Yes, required fields need to be answered accurately in order to be granted access to the MLMS.

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ASSISTER TRAINING

1. **What is the required training?**

    ANSWER: Required training varies by Assister Type:

    1. Navigators who are re-certifying need to take the "Privacy, Security, and Fraud Prevention Standards" and"Advanced Marketplace Issues" modules.

    2. New Navigators & IPAs must take all of the following:
        a. Training Overview
        b. Health Insurance Basics
        c. Affordable Care Act Basics
        d. Marketplace Basics
        e. Marketplace Eligibility and Application Assistance
        f. Marketplace Affordability and Assistance Programs
        g. Marketplace Enrollment and Appeals Assistance
        h. Marketplace Exemptions Assistance
        i. SHOP Marketplace Assistance
        j. Cultural Competence and Language Assistance
        k. Serving Vulnerable and Underserved Populations
        l. Working with Consumers with Disabilities
        m. Customer Service Standards and Community Outreach
        n. Privacy, Security, and Fraud Prevention Standards

        New Navigators & IPAs have the Option of taking the following:
        a. Advanced Marketplace Issues-Optional

3. CACs must take all of the following:
   a. Training Overview
   b. Marketplace Eligibility and Application Assistance
   c. Marketplace Affordability and Assistance Programs
   d. Marketplace Enrollment and Appeals Assistance
   e. Marketplace Exemptions Assistance
   f. SHOP Marketplace Assistance
   g. Privacy, Security, and Fraud Prevention Standards

2. **Are there any course prerequisites?**
   ANSWER: The MLMS will direct you when prerequisites are necessary in order to access a specific course or exam.

3. **How do I search and register for a course/curriculum if I do not have a CMS Portal Login?**
   ANSWER: To search for a course or curriculum a user must first create a CMS Enterprise Portal account and setup their account for the Assister role. When that step is complete, refer to FAQ General/Troubleshooting question #4.

4. **How do I search and register for a course/curriculum if I already have CMS Portal Login?**
   ANSWER: To access the MLMS and complete training for returning assister with CMS Portal Login, first log in to the MLMS (Please reference FAQ #3 in the General/Troubleshooting section of the document) and then complete the following steps:
   1. On the MLMS assister landing page, look for the "Training Options" section.
   2. Identify the curriculum you wish to enroll in, and hover your cursor over the "Actions" link to the right of that curriculum.
   3. In the bubble that appears, select the "Enroll" button
   4. Then select the "Complete Enrollment" button.
   5. Select the "Go to Current Learning" button at the bottom of the MLMS Assister landing page.
   6. You may start the curriculum's courses by selecting the "Launch" button next to each course.

5. **Do I have to take all the courses in the curriculum?**
   ANSWER: Required training varies by Assister Type. See required training answer above in FAQ #1.

6. **How do I verify that I am enrolled in a course/curriculum?**
   ANSWER: On the MLMS home page, look for the area titled "Current Learning," all courses you are currently enrolled in will appear there.

7. **How do I see all the training content I'm enrolled in, including courses I started but did not finish?**
   ANSWER: On the MLMS home page, look for the area titled "Current Learning." A snapshot is found on the MLMS landing page or click the Current Learning button in the left-hand navigation. All courses you are currently enrolled in will appear there.

8. **How do I view my transcript?**
   ANSWER: On the MLMS home page, look for the area titled "Curriculum Status." Click on the title link of your curriculum and the courses that have been completed and those that remain will be displayed.

9. **How do I prove I've completed the required training to become certified?**
   ANSWER: Once you have completed all training requirements for your specific assister type, you may print the registration completion certificate for which you completed training. Complete the following steps to print your certificate:
   1. On the MLMS assister landing page, look for the "Curriculum Status" section.
   2. Hover over the "Actions" link next to the applicable curriculum
   3. Click "Print Certificate"
   4. Click "Print" in the top left of the pop-up window

10. **What do I do when I have a question about the curriculum?**

   ANSWER: It varies:
   o Navigators that have questions about the curriculum can send their inquiries to the Navigator inbox NavigatorGrants@cms.hhs.gov or contact their Program Manager, who will then communicate the questions to the Project Officer.
   o Certified Application Counselors (CACs) that have questions about the curriculum can send their inquiries to the CAC inbox at CACQuestions@cms.hhs.gov.
   o In-Person Assisters and all other user types can send their questions to their leadership organization.

11. **Training in Other languages?**

   ANSWER: The MLMS supports two languages, English and Spanish.

12. **How do I take training in Spanish?**

   ANSWER: A user may choose to complete their training in English or Spanish.   To access the Spanish training, complete the following steps:
   1. From within the CMS Portal, access the MLMS.
   2. On the Welcome to the MLMS assister profile page, select "Spanish" from the Training Language Selection drop-down.
   3. Click the "Save/Update" button.
   4. Log out of the CMS Enterprise Portal and then log back in to reset the language
   5. Access the MLMS and this time click the "Next" button on the profile page
   6. The MLMS portlets and all training content now appear in Spanish.

   If you select one language, start their coursework and then decide to switch to the other language you will be required to complete any coursework already started in the new language.

ASSISTER CERTIFICATION
   1. **How do I become certified?**
      ANSWER:

         o If you are a Navigator/In-person Assister in a state with a Federally-facilitated Marketplace (FFM), you will receive certification after being assigned an Assister ID by your supervisor, have completed the required curriculum, and have completed any additional state requirements to become certified in the FFM.
         o For Certified Application Counselors (CACs), you will receive certification form your CAC-designated organization after taking the required courses and any other requirements of your designated organization.
         o For State In-person Assisters (IPA), you will receive your certification from your State and not from the FFM.

   2. **What is the difference between becoming Federally-facilitated Marketplace (FFM) certified and receiving a training completion certificate?**
      ANSWER:

      For Navigators, upon completion of the required curriculum in the MLMS, Navigators will receive an MLMS-generated certificate for completing the training. The MLMS will also validate that the user is registered with a Navigator Grant Organization prior to issuing him/her a Federal Certificate once he/she completes training.
         o Navigators in states without additional state requirements should consult their grant leadership once federal certification is obtained for guidance regarding next steps prior to assisting consumers.
         o Navigators in states with additional certification, licensure or registration requirements for assisters must fulfill the additional state requirements before they can assist consumers.
      Assisting consumers without the official Federal or state (if applicable) certification violates the Terms and Conditions. Once Navigators have received the Official Navigator Certificate, and have completed any applicable state requirements, they become FFM Certified.

For CACs, upon completion of the required curriculum in the MLMS, CAC will receive an MLMS generated certificate for completing the training. The CAC would then need to present the certificate to their designated CACorganization to be considered for certification under the organization's CAC agreement.

3. **Does my certification expire? How do I renew certification?**
   ANSWER:

   If you are a Certified Application Counselor (CAC) the expiration date is determined as "365 days after training is completed", but you may have additional requirements from your state or designated organization. For all others, contact your supervisor for assistance.

4. **What is Navigator Recertification Training and am I eligible?**
   ANSWER:
   - **What is recertification training?**
     - The Navigator recertification training is an abbreviated training curriculum consisting of two courses entitled: "Privacy, Security, and Fraud Prevention Standards" and "Advanced Marketplace Issues."
   - **Am I eligible?**
     - If you were certified as a FFM Navigator at the end of the 2015-2016 grant period, and are still affiliated with the same organization, you will be able to recertify by taking the abbreviated trainingconsisting of the "Privacy, Security, and Fraud Prevention Standards" and "Advanced Marketplace Issues" courses.
     - Navigators who were uncertified, decertified, or who are now affiliated with a different Navigator Grantee organization will have to complete the entire federal Navigator training curriculum to becomecertified for the 2017 plan year. All state certification and re-certification requirements will also needto be met.

5. **Which entity has the authority to certify me as a FFM assister?**
   ANSWER:
   - If you are a Navigator/IPA in a FFM you are certified by CMS in addition to the state in which you are operating.
   - If you are a CAC, you are certified by your Designated Organization.
   - State-based Personnel should refer to their state or State-based Marketplace for the authorized certificationentity and certification requirements.

6. **How can I access my certificate again once training is complete?**
   ANSWER: To access your certificate log into the CMS Enterprise Portal and follow these steps:
   1. Update your profile information as needed and click "Save/Update" or "Next" if no information needs an update
   2. Click Curriculum Status in the left-hand navigation
   3. On the Curriculum Status page, hover over the "Actions" link next to the applicable curriculum and click "Print Certificate"
   4. Click "Print" in the top left of the pop-up window

   NOTE: The date of completion will be found on the Registration Completion certificate.

TERMS & DEFINITIONS

The following is a list of definitions to terms that you may encounter as part of the CMS Portal account creation process, the MLMS registration process, or in the assister curriculum:

1. **Business Entity** - A business entity is identified by the Internal Revenue Service (IRS) when it assigns an Employer Identification Number (EIN). It may or may not be that business entity's Taxpayer Identification Number (TIN).

2. **CAC or Certified Application Counselors** - Certified Application Counselors (CAC) are staff and volunteers designated by organizations to help consumers understand, apply, and enroll for health coverage through the Marketplace. Certified application counselors perform many of the same functions as Navigators and non-Navigator assistance personnel. Examples of these designated organizations include community health centers or other health care providers, hospitals, or social service agencies.

3. **CMS Enterprise Identity Management System** - The CMS Enterprise Identity Management System (EIDM) includes Identity Verification, Access Management, Authorization Assistance Workflow Tools, and Identity Lifecycle Management functions (i.e., Password Reset, Forgot User ID, etc.).

4. **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.

5. **Federally-facilitated Marketplace (FFM)** - A Federally-Facilitated Marketplace (FFM) operates in states that have chosen not to build their own Marketplace. The Marketplace developed by CMS will be adapted to meet the needs of any state that chooses to utilize this model on a temporary or permanent basis.

6. **Federally-facilitated Marketplace Assister Registration** - The FFM Assister Registration process includes completion of required training and execution of the FFM Agreements by Navigators, CAC, or non-Navigator assistance personnel in a Federally-facilitated Marketplace (FFM) before providing consumer assistance.

7. **Individual Marketplace** – The Individual Marketplace is a resource where individuals can learn about their health coverage options; compare health insurance plans based on costs, benefits, and other important features; choose a plan; and enroll in coverage.

8. **IPA** - In Person Assisters are individuals that are trained and able to provide help to consumers, small businesses, and their employees as they look for health coverage options through the Marketplace, including helping complete eligibility and enrollment forms.

9. **Marketplace Learning Management System (MLMS)** - The MLMS delivers online learning content for agents, brokers Navigators, Certified Application Counselors, and non-Navigator Assistance Personnel in the Federally-facilitated Marketplace and State Partnership Marketplaces. It facilitates the training and registration of these user groups to enable them to assist consumers with enrollment through the Federally-Facilitated Marketplaces.

10. **MLMS Course** – MLMS Web-Based Training (WBT) courses are designed for self-paced training via the Internet.

11. **MLMS Curriculum** – Depending on the role you select, you will be prompted to complete all of the courses in the curriculum for that user role in order to receive a certificate of completion.

12. **Navigator -** The role of Navigators includes helping consumers find out if they qualify for insurance affordability programs, and if they're eligible, helping them choose a plan and enroll. Navigators also provide outreach and education to consumers to raise awareness about the Marketplace, and refer consumers with complaints, questions, or grievances about their coverage to health insurance ombudsmen or other consumer assistance programs or state agencies.

13. **Remote Identity Proofing (RIDP)** – Remote ID proofing is used to verify your identity and is done by asking you questions based on your personal and financial history.

14. **Small Business Health Options Program (SHOP) Marketplace** – The Small Business Health Options Program (SHOP) Marketplace helps small businesses provide health coverage to their employees. The SHOP Marketplace is open to employers with 50 or fewer full-time equivalent employees (FTEs), including non-profit organizations.

15. **State Based Marketplace**- States across the country have received grants to establish a Health Insurance Marketplace. The state-based Marketplace will provide individuals and small businesses with a "one-stop shop" to find and compare affordable, quality private health insurance options.

16. **State Partnership Model (SPM)** – Through a hybrid model called a State Partnership Exchange, States may assume primary responsibility for many of the functions of the Federally-facilitated Exchange permanently or as they work towards running a State-based Exchange.

17. **Web-based Entity (WBE) -** A Web-based Entity is an entity designed for access via the Internet.