

Maryland Health Connection: Step-By-Step Guide to Training For Producers



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Introduction & Overview

This document provides Producers who are seeking authorization with Maryland Health Benefit Exchange a step by step guide for accessing The MHBE Portal for CAW Registration & Application to complete the required training for the 2020-2021 plan year. Follow these instructions in order to fulfill your training obligations and ensure that you are able to assist your clients with their enrollments.

Major Training Milestones for the 2020-2021 Open Enrollment Period

Accessing the required training for Producers seeking authorization can be described in three major steps.

1. Create a The MHBE Portal for CAW Registration & Application and Complete Producer Application specific to your producer role.
2. Once your application has been approved; you will have access to your training applicable to your producer role.
3. Complete the required online training for OE 2020-2021 (See Chart below). Required training must be completed within in 45 days once your application is approved.

OE 2020-2021 Training Requirement Chart

| Course | New Producer: Individual & SHOP | New Producer: Individual Only | New Producer: Small Biz Only | Returning Producer: Individual & Small Biz | Returning Producer: Individual Only | Returning Producer: Small Biz Only |
|---|--|--------------------------------------|-------------------------------------|---|--|---|
| Pre-Authorization Training Curriculum | X | X | X | n/a | n/a | n/a |
| 2020 Annual Training Curriculum Available until 11/1/2020 | X | X | X | X | X | X |
| Consumer Portal System Training 2020 | X | X | X | optional | optional | optional |
| Small Biz Enrollment Webinar | optional | n/a | optional | n/a | n/a | n/a |

Account Creation

Go to <https://mhbe.force.com/training/CustomCommunityLogin>

If you already have a MHBE Portal for CAW Registration & Application Account, skip the application step.



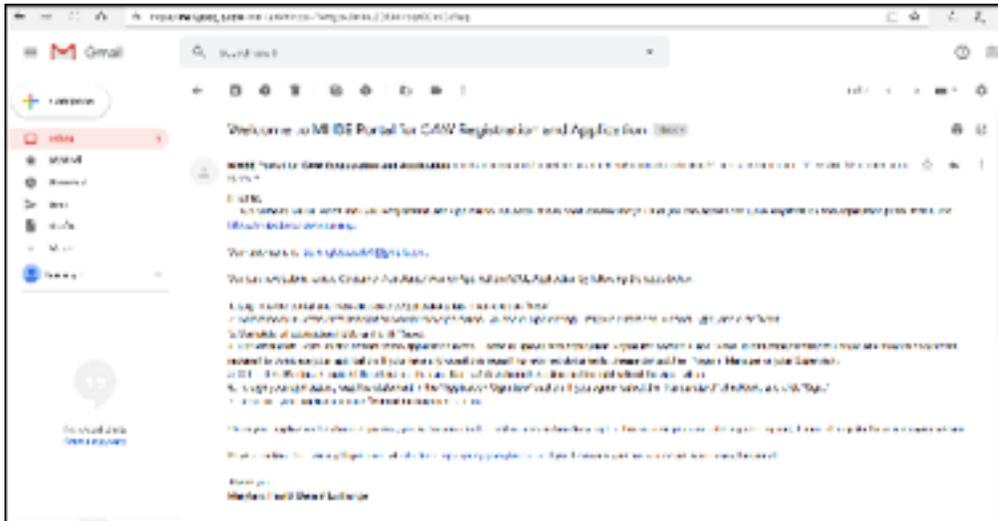
Select the Register link.



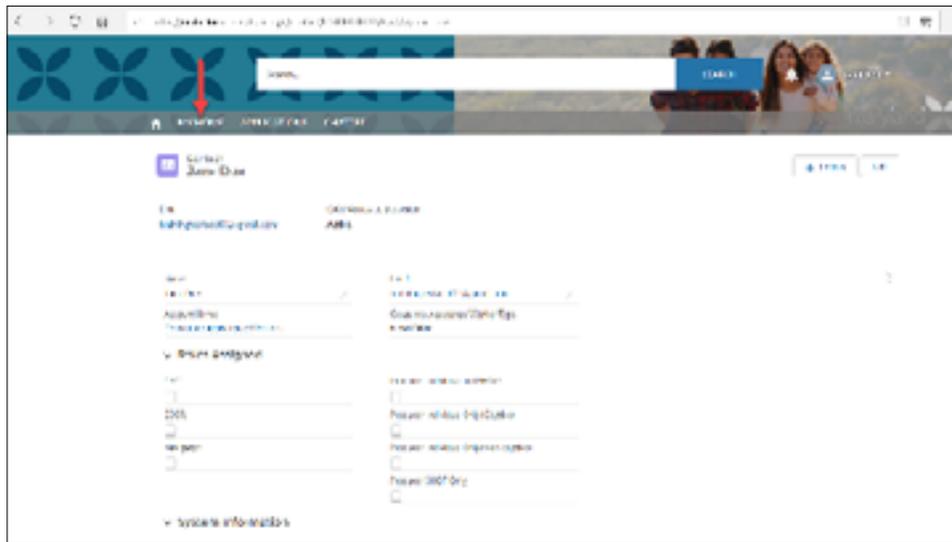
Complete the registration form by entering your First Name, Last Name, Email, and create a password (Password should be at least 10 characters long and a mix of characters and numbers). Click the submit button.

You will receive a confirmation email with the subject “Welcome to MHBE Portal for CAW Registration and Application Portal” The email contains the Welcome to MHBE Portal for CAW Registration and Application Portal link: <https://mhbe.force.com/training/CustomCommunityLogin> so that you can complete and submit an application for the Maryland Health Connection CAW role in which you will be working.

Click on the link provided in the confirmation email and enter you login credentials you created during registration.



Click on the Home Tab. This shows an overview of the information you entered when creating an account as well as any CAW roles that were approved and assigned to your account.

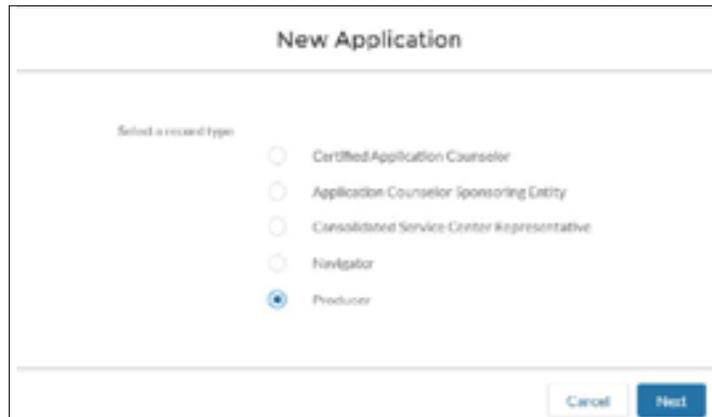


Application

Click on the Applications tab. Click on the Create New Application button.



Select your role in which you are applying for Maryland Health Connection from the drop down menu and click continue.

A screenshot of the 'New Application' form. The title 'New Application' is centered at the top. Below the title, there is a label 'Select a record type' followed by a dropdown menu. The dropdown menu is open, showing five options: 'Certified Application Counselor', 'Application Counselor Sponsoring Entity', 'Consolidated Service Center Representative', 'Navigator', and 'Producer'. The 'Producer' option is selected, indicated by a blue circle with a white checkmark. At the bottom right of the form, there are two buttons: 'Cancel' and 'Next'.

Enter requested information into the application fields:

- Company/Agency Name – this appears on the website
- Company Agency Website – this appears on the website
- Languages spoken other than English – this will appear on the website
- Do you want your info to appear in search? – the default is yes. If unchecked, you will not appear in the Find Assistance search
- Assistance Offered Email – this will appear on the website
- Assistance Offered in Person – this will appear on the website
- Assistance Offered Phone – this will appear on the website
- National Producer Number – ensure this number matches your license
- Maryland Insurance License Number – ensure this number matches your license
- Authorization for Individual Exchange? – this is to individual insurance to Maryland residents
- Seeking Authorization for SHOP Exchange – this is to sell group insurance to small businesses
- Are you a Captive Producer? – this is only if you work directly with one carrier
- What Connector Entity Region do you work? (What region do you primarily work with?) – this is used by Connector Entities to refer consumers to producers

The image shows a screenshot of a web-based application form. The form is organized into several sections. At the top, there are two text input fields: 'Company/Agency Name' and 'Company Agency Website'. Below these are two columns of fields. The left column includes a 'Languages spoken other than English' section with a list of languages (Albanian, Arabic, Basque, Cantonese) and a 'Choose' button, followed by a checkbox for 'Do you want your info to appear in search?' which is checked. Below that are three checkboxes for 'Assistance Offered Email', 'Assistance Offered in Person', and 'Assistance Offered Phone'. The right column includes a 'System ID' text field, an 'Application Status' dropdown menu set to 'In Progress', an 'Application Number' text field, and a 'Contact' section with several dropdown menus: 'National Producer Number', 'Maryland Insurance License Number', 'Authorization for Individual Exchange?' (set to 'None'), 'Seeking Authorization for SHOP Exchange?' (set to 'None'), 'Are you a Captive Producer?' (set to 'None'), 'What Connector Entity Region do you work?' (set to 'None'), and 'Primary Carrier?'.

Enter your Address Information:

- Please be sure to choose the correct state if you do not reside in MD.
- If your Mailing address is not the same as your business address, type your address in the Mailing Address fields.
- If your Mailing address is the same as your business address, check the box.

Address Information

*Business Address Line 1 Is Mailing & Business Address the same?

Business Address Line 2 Mailing Address Line 1

*Business City Mailing Address Line 2

*Business State Mailing City

*Business Zip Code Mailing State

Business County Mailing Zip Code

Enter your Contact Information:

- Work Phone – this will appear on the website
- If you will be using a different phone number for MFA, type the cell phone number in the MFA Cell Phone field
- If you are using your work cell phone for MFA, check the box
- Business Email – this will appear on the website
- If you will be using a different email address for MFA, type the email address in the MFA Email Address field
- If you are using your business email address for MFA, check the box

Contact Information

*Work Phone Use for MFA? (Must be a cell phone)

*Business Email Use Business email for MFA?

MFA Contact Information

MFA Cell Phone MFA Email Address

Producers will need to download the Non-Exchange Entity Agreement (NEEA) and the Attestation. Instructions to complete these documents:

Attestation should be completed as follows:

On the last page, print your name, NPN, sign your name, and print date of signature

NEEA should be completed as follows:

Page 1 - print your name

Page 9 - print your address, name, phone number, and email address

Page 10 - On the right side, under Non-Exchange Entity:

By: Sign your name

Name: Print your name

Title: Print your title

Date: Print date of signature

| Action | Status | Expiration Date | Valid Till |
|--|--------|-----------------|------------|
| <div style="display: flex; align-items: center;">Select Type*<div style="margin-left: 5px;"><div style="border: 1px solid #ccc; padding: 2px;">Select Attachment Type</div><ul style="list-style-type: none">E & OAttestationNEEAMD License</div></div> <div style="margin-left: 10px;"><input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/></div> | | | |

You will need to check the I Understand box and click “Sign”

Before submitting your application, please follow the instructions below to upload the required forms:

- Click on the form name to download the forms
- Print out each of the forms and sign the forms where required
- Upload a scanned copy of each form individually in PDF format
- Upload a PDF copy of your E & O certificate.
- Upload a PDF copy of your MD license.

[Individual And SHOP Non-Exchange Entity Producer Statement of Agreement PNL](#)
[Individual And SHOP Maryland Health Connection Statement Producer Attestation](#)

Please click on the checkbox below to indicate that you agree to the terms and click on Sign button. Click on Submit for approval after you have signed the application.

By checking the box, I am indicating my consent to electronically sign this application and warrant that all of the information I have provided is true, complete, and accurate. I agree to update any change of address, phone or email within 30 days of the change. I have read, understood, and will attest to the Attestations for the type of position for which I am applying. I understand that I will be required to abide by all applicable state and federal regulations.

I Understand

After documents are loaded and the application is signed, producers will need to click “Submit for Approval” at the top of the page

Application AN-004228

Edit Renew Submit for Approval

Application Detail

| | |
|--------------------------------------|-------------------------|
| Producer Type Individual And SHOP | Record Type Producer |
| Company/Agency Name | Contact Test Lorie |
| Company Agency Website | Created By |

Approval History (0)
Open Activities (0)
Activity History (0)

A box will pop up and producers should click Submit - comments are not necessary.

Submit for Approval

Comments

I

After Application Submission

After you have submitted your application, it will appear in your applications tab as “submitted.”



The screenshot shows a web interface for managing applications. At the top left, there is a header with a refresh icon, the text 'Applications', and a dropdown menu labeled 'Recently Viewed'. To the right of the header is a search bar with the placeholder text 'Search this list...' and several action icons (add, delete, edit, etc.). Below the header, there is a table with the following columns: SYSTEM ID, APPLICATION NUMB., CONTACT, RECORD TYPE, and APPLICATION STAT. The table contains one row with the following data: SYSTEM ID: AN-000553, APPLICATION NUMB.: GAO-00023, CONTACT: Tera Sandborn, RECORD TYPE: Certified Application Coordinator, and APPLICATION STAT.: Submitted. The 'APPLICATION STAT.' column is highlighted with a red box.

| SYSTEM ID | APPLICATION NUMB. | CONTACT | RECORD TYPE | APPLICATION STAT. |
|-----------|-------------------|---------------|-----------------------------------|-------------------|
| AN-000553 | GAO-00023 | Tera Sandborn | Certified Application Coordinator | Submitted |

You will also receive a confirmation email regarding the approval of your application.

Once the application is approved, you should look for a communication from Adobe Captivate Prime inviting them to create an account and login. You should receive this email within 3-5 business days after receiving approval.

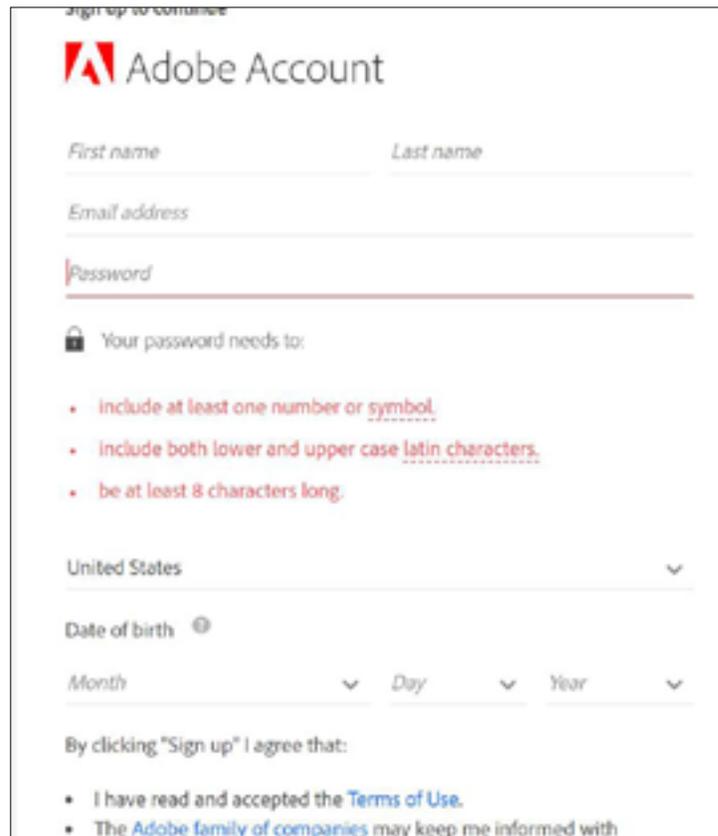
Please Note : You will not be allowed access to training in the LMS without an approved application.

Adobe Captivate Prime Account Creation

Adobe accounts that have been created with your work email (IE, maryland.gov or other official email domains) are acceptable to use for your training profile.

In addition, please make note as you create your account that your password must:

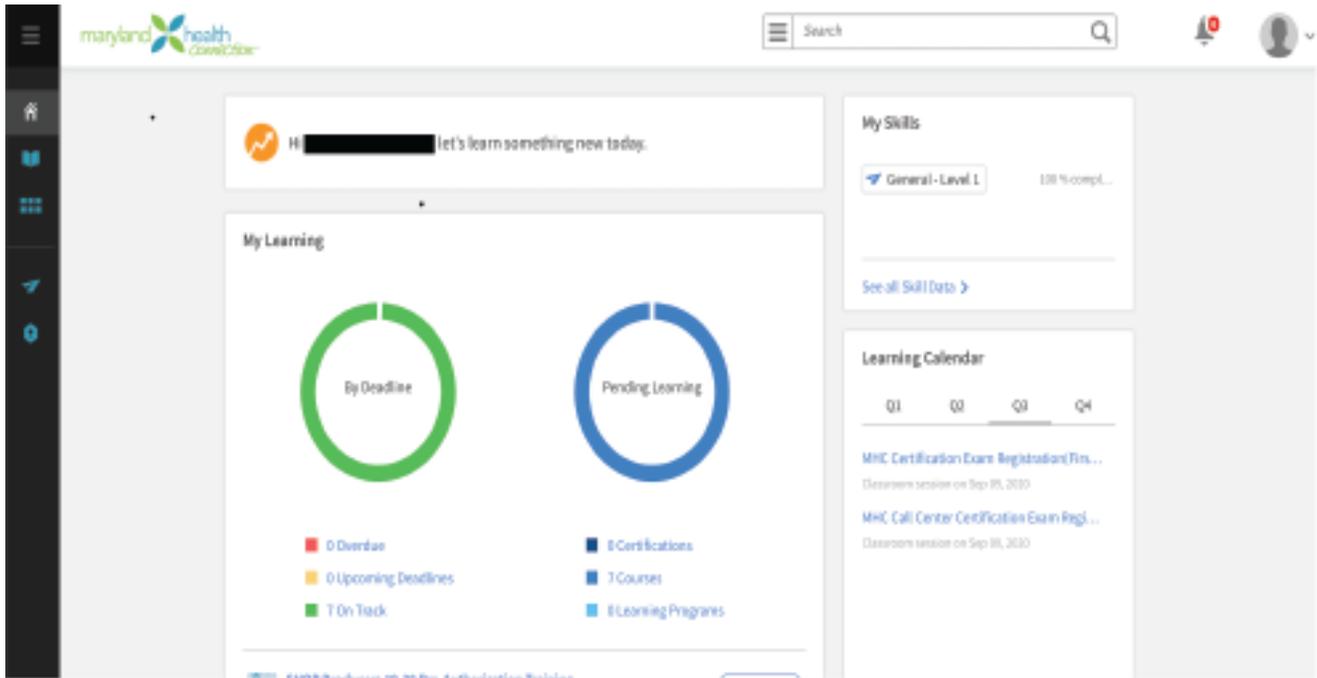
- Include at least one number or symbol
- Include both upper and lower case latin characters
- Be at least 8 characters long.



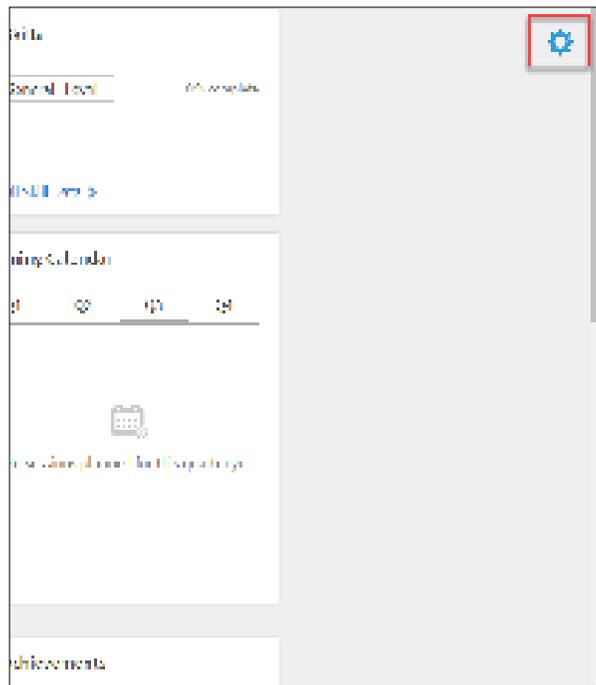
The screenshot shows the Adobe Account creation form. At the top, it says "Sign up to continue" and "Adobe Account". The form includes fields for "First name", "Last name", "Email address", and "Password". Below the password field, there is a lock icon and the text "Your password needs to:" followed by three bullet points: "include at least one number or symbol", "include both lower and upper case latin characters", and "be at least 8 characters long". Below this, there is a dropdown menu for "United States" and a "Date of birth" section with "Month", "Day", and "Year" dropdowns. At the bottom, it says "By clicking 'Sign up' I agree that:" followed by two bullet points: "I have read and accepted the Terms of Use" and "The Adobe family of companies may keep me informed with".

Navigating Your Adobe Captivate Prime Learner Account

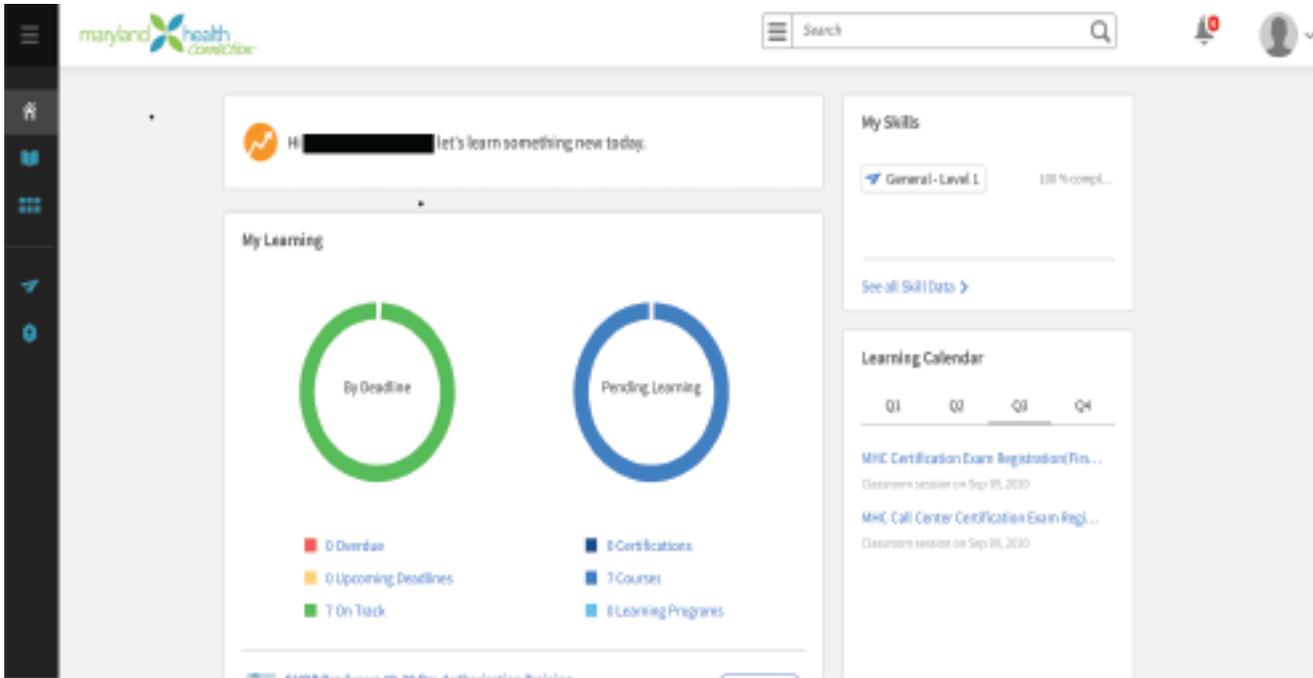
Upon opening Captivate Prime, you will see your dashboard:



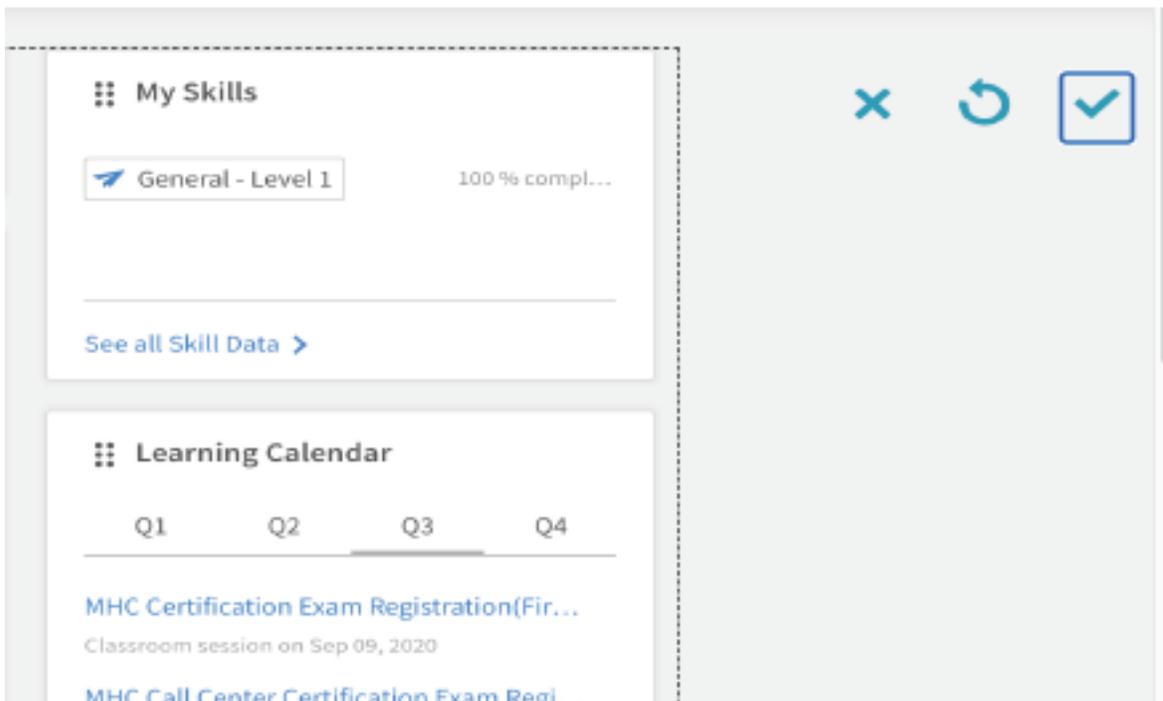
Dashboard helps you organize your training. It can be customized clicking the gear button in the upper right corner.



When you click on the gear button, a dotted line will appear around your profile. Once it does, you can drag and drop the “widgets” (pieces of your profile) around within that space to organize them the way you prefer.



You may return to the top right of your screen to save your changes, reset your dashboard to its prior layout, or cancel the changes you have made.



The “By Deadline” donut on your screen lets you know about training that’s overdue (in red) or nearing a deadline (in yellow).

The “Pending Learning” donut on your screen uses shades of blue to let you know about courses and learning programs that have been assigned to you.

The screenshot displays the Maryland Health Connection dashboard. At the top left is the logo. A search bar and a notification bell are at the top right. The main content area features two donut charts: "By Deadline" (green) and "Pending Learning" (blue). Below these are statistics for overdue, upcoming, and on-track training, as well as certifications and learning programs. A list of assigned trainings follows, each with a "Visit" button. On the right, there is a "Learning Calendar" with a quarterly view and a "My Job Aids" section listing various system updates and manuals.

| Category | Count |
|--------------------|-------|
| Overdue | 0 |
| Upcoming Deadlines | 0 |
| On Track | 7 |
| Certifications | 0 |
| Courses | 7 |
| Learning Programs | 0 |

| Training Title | Assigned By | Due | Action |
|---|-------------|-------------|--------|
| SHOP Producers 19-20 Pre-Authorization Training | Admin | No Deadline | Visit |
| Individual Producers 2019 Pre-Authorization Training | Admin | No Deadline | Visit |
| Individual & SHOP Producers 2019 Pre-Authorization Training | Admin | No Deadline | Visit |
| CAM Pre-Credentialing 19-20 Training | Admin | No Deadline | Visit |
| MHC Policy Glossary | | | |

| Calendar Item | Session Date |
|--|--------------|
| MHC Certification Exam Registration (Firs... | Sep 08, 2020 |
| MHC Call Center Certification Exam Regl... | Sep 08, 2020 |

| Job Aid Title | Assignment Type |
|------------------------------------|---|
| SHOP Manual 8, 2019 | Part of SHOP Producers 19-20 Pre-Authorization T... |
| MHC System Update R30.3.2020 | Self-assigned |
| MHC System Updates R30.1.4.24.2020 | Self-assigned |
| MHC System Update R31.5.2020 | Self-assigned |

You can launch any of those trainings from the list directly below the donuts.

You will also find a recommended learning box below the list of assigned trainings.

To the right of the donuts, you will find a calendar of your learnings assignments. It is divided by quarter.

Beneath your calendar and across from your recommended training list, you will see the Job Aides widget. This is where you will find any job aides assigned to you.

Search

My Skills

General - Level 1 100 % compl...

[See all Skill Data >](#)

Learning Calendar

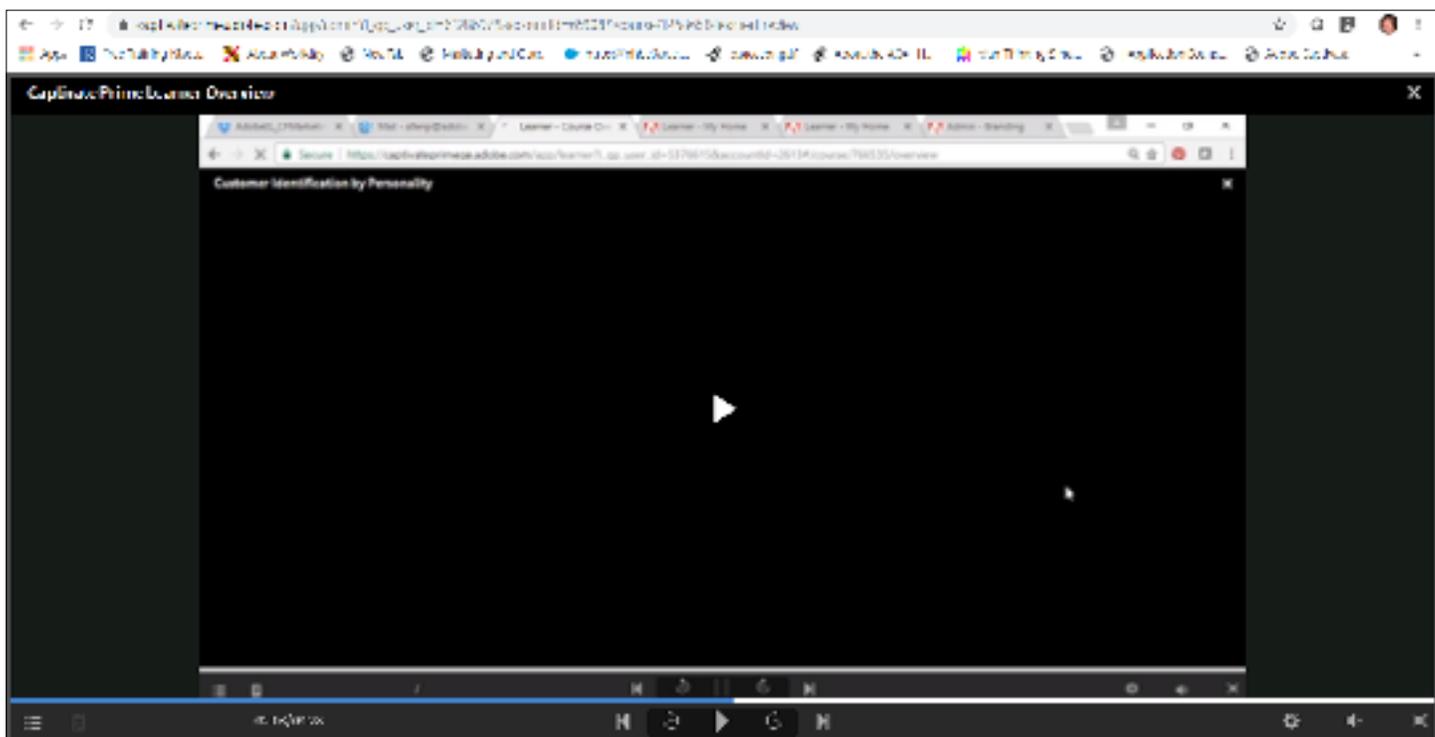
Q1 Q2 Q3 Q4

[MHC Certification Exam Registration\(Firs...](#)
Classroom session on Sep 09, 2020

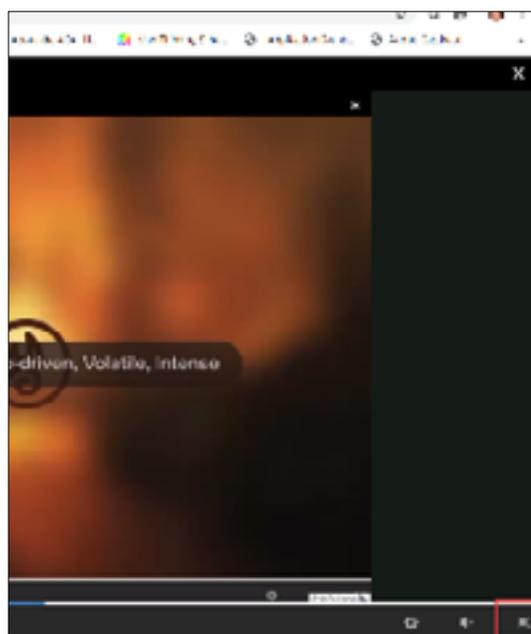
[MHC Call Center Certification Exam Regi...](#)
Classroom session on Sep 09, 2020

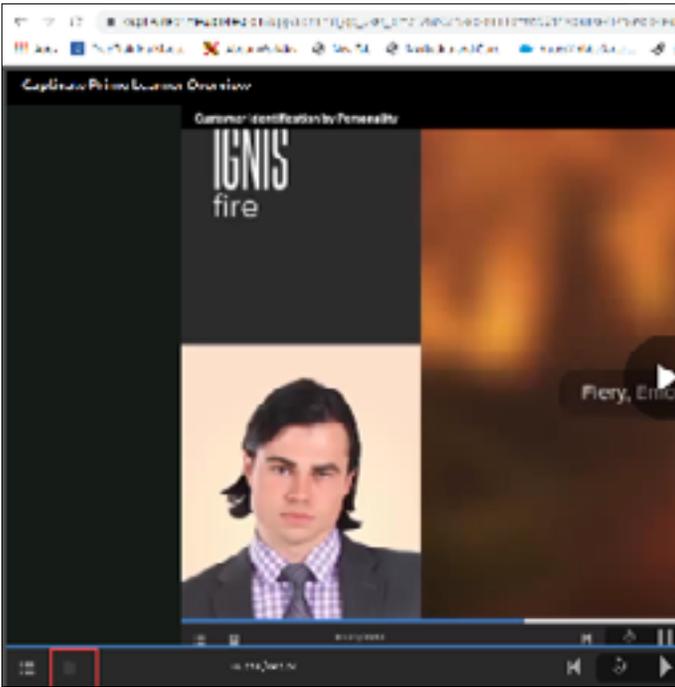
Using Your Course Player

Once you start a course, it will appear in the player. This player adapts to fit different kind of content. It will also automatically guide you through all elements of your courses.

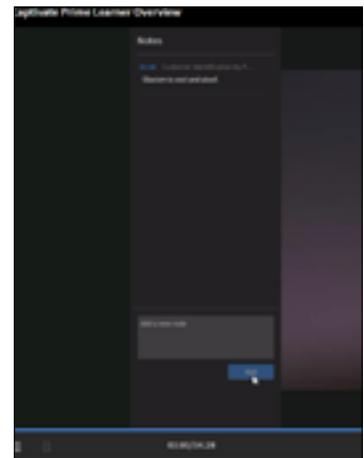


Once you enter the player, a full screen button will be at bottom right.

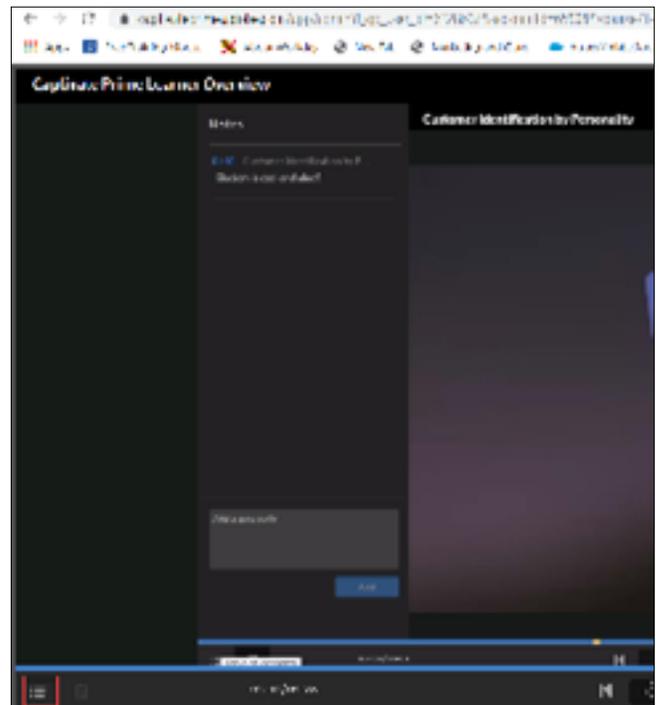




To the bottom left of your player, you will see the notebook button. This button gives access to your notes panel, where you can type notes and Captivate Prime will save them for you.



Also located at the bottom left of your player is the table of contents button.



Help Features

If you need help with your Learner Profile or Course Player, there is a handy “Help” option with solutions to common problems.

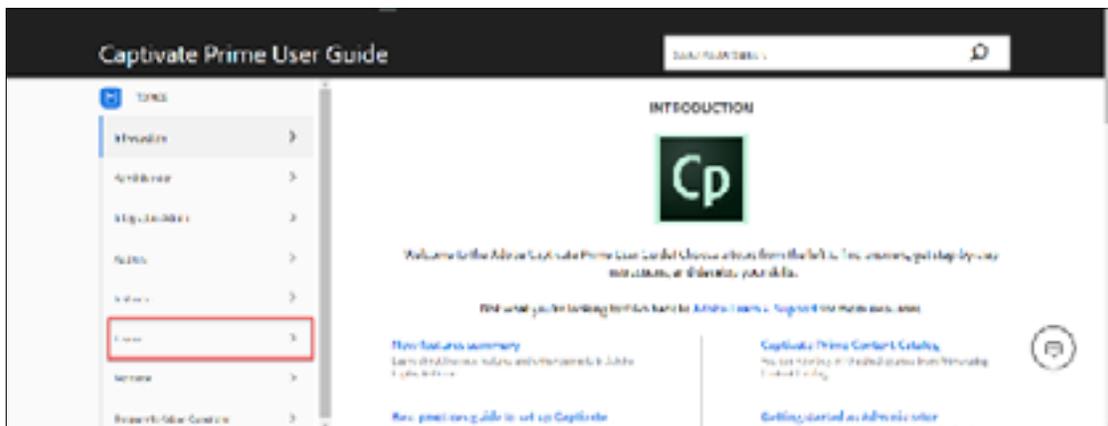
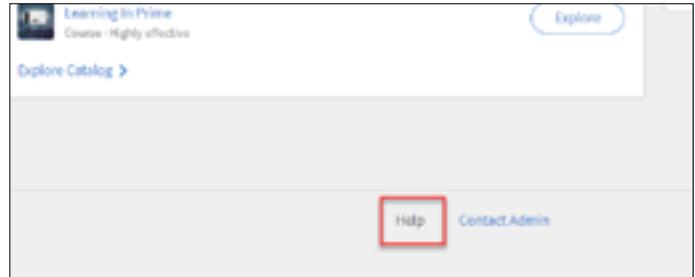
To find this help option, click on your profile icon in the top right of your profile.

Scroll to the “Help” option in the drop down menu and click it.

You may also find the “Help” option in the footer of your Learner Dashboard.

This will route you to the Captivate Prime User Guide.

Choose Learner from the menu on the left side of the screen to find more information.



SHOULD YOU EXPERIENCE ANY DIFFICULTIES, ERRORS, OR OTHER ISSUES IN ANY STEP OF THIS TRAINING PROCESS, PLEASE CONTACT OUR MHBE TRAINING TEAM VIA EMAIL AT MHC.TRAININGSUPPORT@MARYLAND.GOV

After You Have Completed Training

Congratulations! You have now completed your required training!

If you are a returning producer: You should now be prepared to help your clients during the upcoming enrollment period.

If you are a new producer: Please refer to your initial authorization email for any other requirements that you must complete. If you have completed all of the requirements, you should expect to receive your authorization letter from us within a week. If you have not received your authorization letter from us within a week of completing all of the authorization requirements, please feel free to ask us for an update on when you will receive your authorization letter. You can email us at mhbe.producers@maryland.gov.

Once you receive your authorization letter, you should be all set to help your clients during the upcoming enrollment period.