

MARYLAND HEALTH CONNECTION

# STEP-BY-STEP Guide

2023 – 2024

BROKERS





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# Introduction & Overview

This document provides Brokers 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 2023-2024 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 2023-2024 Open Enrollment Period

Accessing the required training for Brokers seeking authorization can be described in three major steps:

1. Create a The MHBE Portal for CAW Registration & Application and Complete Broker Application specific to your broker role.
2. Once your application has been approved; you will have access to your training applicable to your broker role.
3. Complete the required online training for OE 2023-2024 (See Chart below). Required training must be completed within 45 days once your application is approved.

## OE 2023-2024 Training Requirement Chart

Open Enrollment Training Requirement Chart (X=Required)						
Course	New Broker: Individual & Small Biz	New Broker: Individual Only	New Broker: Small Biz Only	Returning Broker: Individual & Small Biz	Returning Broker: Individual Only	Returning Broker: Small Biz Only
2023 Pre-Authorization Training Curriculum	x	x	x	n/a	n/a	n/a
2023 Annual Training Curriculum	n/a	n/a	n/a	x	x	x
Consumer Portal System Learning Resources	x	x	x	optional	optional	optional



# ***Step-by-Step Instructions***





# MHBE Training Account Creation/Application

## Account Creation

1. Go to <https://mhbe.force.com/training/CustomCommunityLogin>  
Click on the Register link.

**Note:** If you already have a MHBE Portal for CAW Registration & Application Account, skip to page ENTER PAGE

The screenshot shows the MHBE Portal for CAW Registration and Application page. At the top is the Maryland Health Connection logo. On the left, there are login fields for Username and Password, a Login button, a Remember me checkbox, a Forgot Password? link, and a Register button (highlighted with a red box). On the right, there is a welcome message and a list of four steps for account creation and application submission. At the bottom center, there is a small Maryland state flag icon.

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Username  
Password

Login

☒ Remember me

[Forgot Password?](#)

[Register](#)

**Welcome to the MHBE Portal for CAW Registration and Application**

1. Create an account using the [Register](#) link on this page.
2. You will receive an email which contains a link to complete and submit an application for your consumer assistance worker role. (If you do not see this email in your in-box, check your spam folder.)
3. Once you submit your completed application and it is approved, you will receive an email with the subject "Your Application Has Been Approved."
4. Once your training courses have been assigned, you will receive log-in instructions for the Learning Management System. Your training and certification testing (if applicable) will be provided on-line.

If you have any problems or concerns, please contact the appropriate program manager.

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

The screenshot shows the MHBE Training Portal Self Registration Page. At the top is the Maryland Health Connection logo. Below the logo, there is a welcome message and instructions for creating a new account. The registration form includes fields for First Name, Last Name, Email, Password, and Confirm Password, followed by a Submit button.

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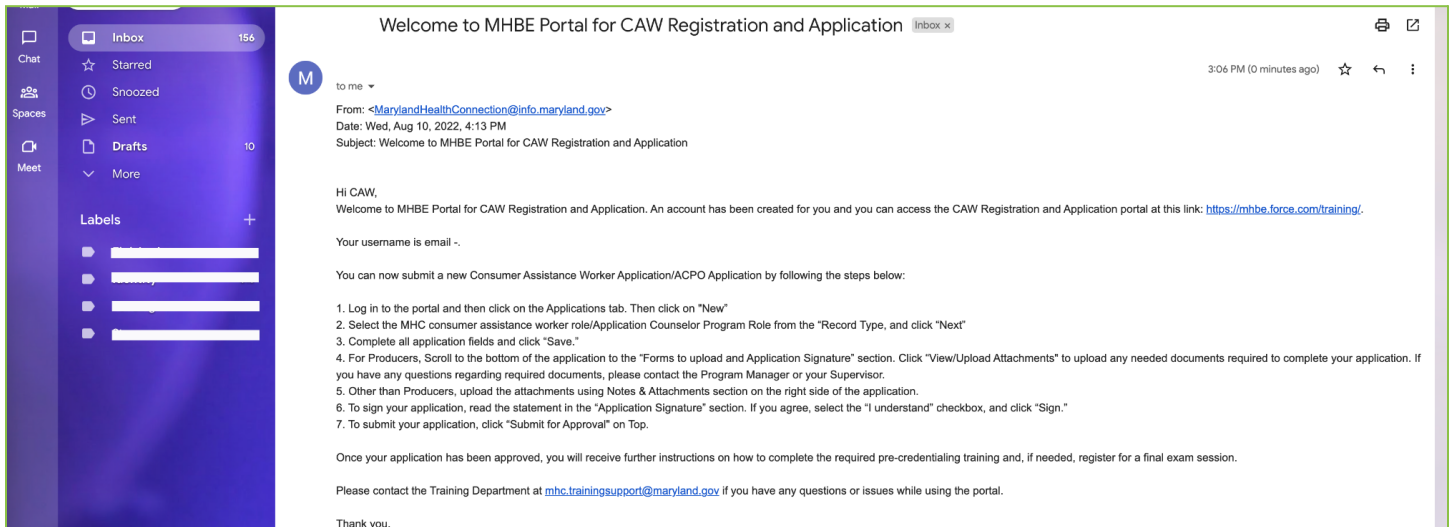
Welcome to MHBE Training Portal Self Registration Page. Please enter all details below to create a new account. Your password should be at least 10 characters long and should be a mix of characters and numbers. Please contact [mhc.trainingsupport@maryland.gov](mailto:mhc.trainingsupport@maryland.gov) if you have any issues creating an account.

First Name  
Last Name  
Email  
Password  
Confirm Password

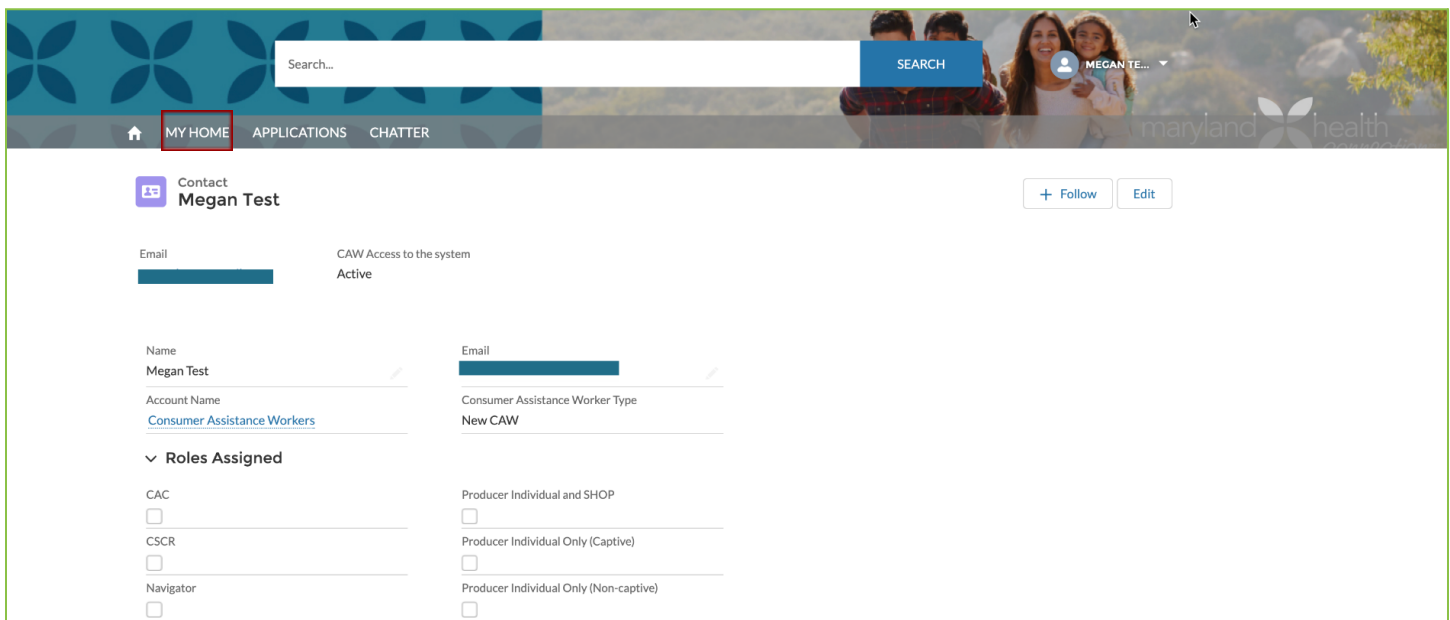
Submit

3. You will receive a confirmation email with the subject "Welcome to the MHBE Portal for CAW Registration & Application." The email contains the MHBE Training Portal link: <https://mhbe.force.com/training/CustomCommunityLogin> so that you can complete and submit an application.

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

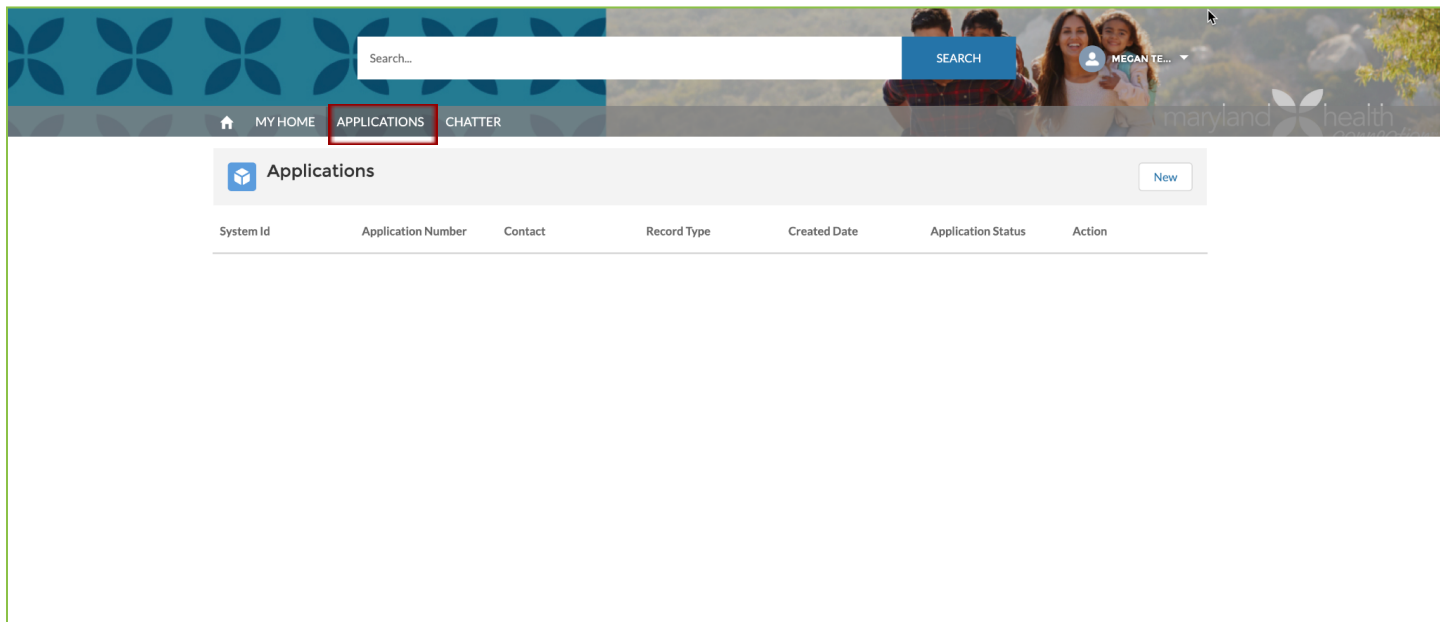


4. Click on the **Home Tab**. This shows an overview of the information you entered when creating an account as well as any CAW roles that were approved and assigned to your account.



# Application

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



2. Select "Producer" from the options and click **Next**.

## New Application

Select a record type

☐ Application Counselor

☐ Application Counselor Program

☐ Consolidated Service Center Representative

☐ Navigator

☒ Producer

### **3. Enter requested information into the application fields:**

- Company/Agency Name – this is visible to consumers
- Company Agency Website – this is visible to consumers
- Languages spoken other than English – this is visible to consumers
- Assistance Offered Email
- Assistance Offered in Person
- Assistance Offered Phone
- National Producer Number – ensure this number matches your license
- Maryland Insurance License Number – ensure this number matches your license
- Authorization for Individual Exchange?
- Seeking Authorization for Small Business?
- Visible to consumers - Individual?
- Visible to consumers - Small Biz?
- 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 brokers


#### **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.

#### **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

4. Please review the entire application. If you are not ready to submit the application, you will be able to log out and come back to edit any information before submitting for approval. Brokers will need to download and complete the Non-Exchange Entity Agreement (NEEA).

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


- Click on the form name to download the forms
- Either print out each of the forms and sign the forms where required & upload a scanned copy of each form individually in PDF format OR download the forms, electronically sign, and upload each 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 FNL

NEEA should be completed as follows:

- Page 1 - print/type your name
- Page 10 - print/type your address, name, phone number, and email address
- Page 12 - On the right side, under Non-Exchange Entity:
- By: Sign your name
- Name: Print/type your name
- Title: Print/type your title
- Date: Print/type date of signature

Brokers will need to open the Attestation document and complete the form:

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


- Click on the form name below to sign the forms.
- Complete sign and click on save. document will auto attached.
- Once sign is completed you can download the forms, by the clicking same below link.

Individual And SHOP Maryland Health Connection Statement Producer Attestation

5. Within the Attestation document, check the box, sign the document, and select "Save"

☒ By checking this box, I hereby attest to the above statements and agree to comply with the policies, procedures and rules established by the Maryland Health Connection.

Sign Here



6. Brokers will need to upload a copy of their Errors & Omissions (E&O) and their Maryland broker license.

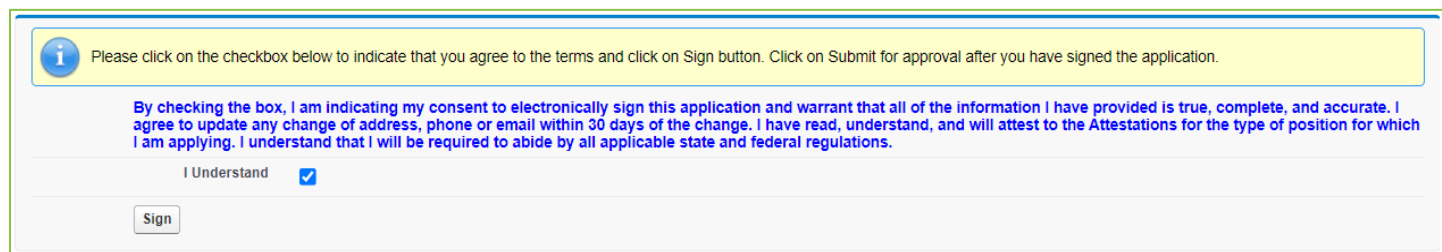
**View / Upload Attachments**

▼ Upload Attachments

<b>Select Type</b>	Select Attachment Type ▼ Select Attachment Type E & O NEEA MD License	<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Upload"/>
<b>Action</b>		<b>Status</b>	<b>Expiration</b>
<a href="#">View</a>		Under Review	

- To upload the required documents:
  - Choose the file type from the drop down
- Please note, the file must be a PDF
- Select "Choose File" to open a new window to select your document
- Select "Upload" to upload your document
- Please note, you can only upload one document at a time

7. Once your application is ready for submission with all requested supporting documentation, you must complete an Application Signature. Please read, click the check box next to “I understand”, and click the **Sign** button.



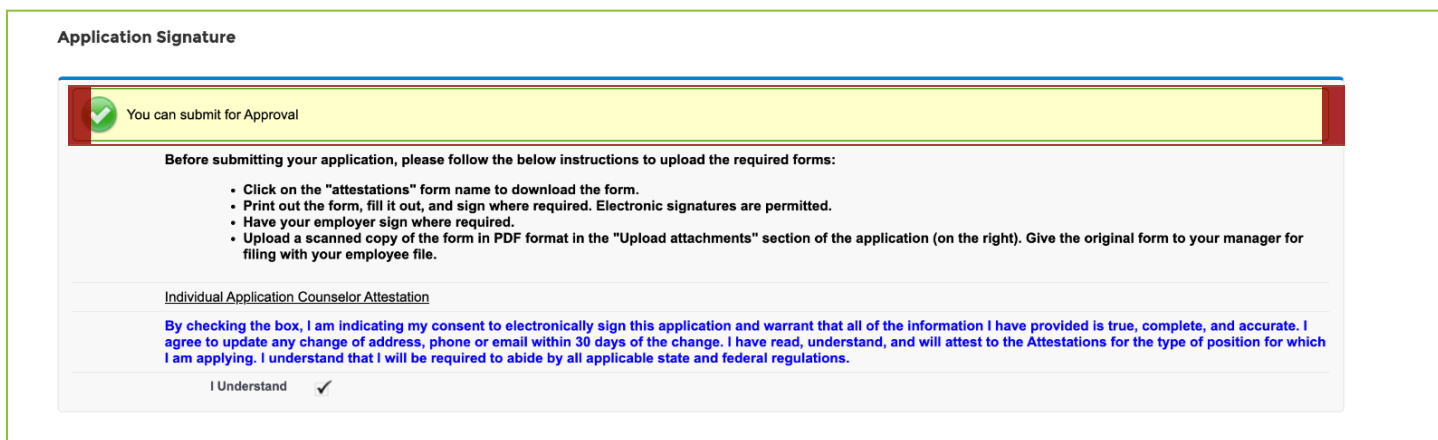
Please click on the checkbox below to indicate that you agree to the terms and click on Sign button. Click on Submit for approval after you have signed the application.

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, understand, 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 ☒

Sign

8. Once you have done this, you will see a notification that your application is ready to submit.



**Application Signature**

You can submit for Approval

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

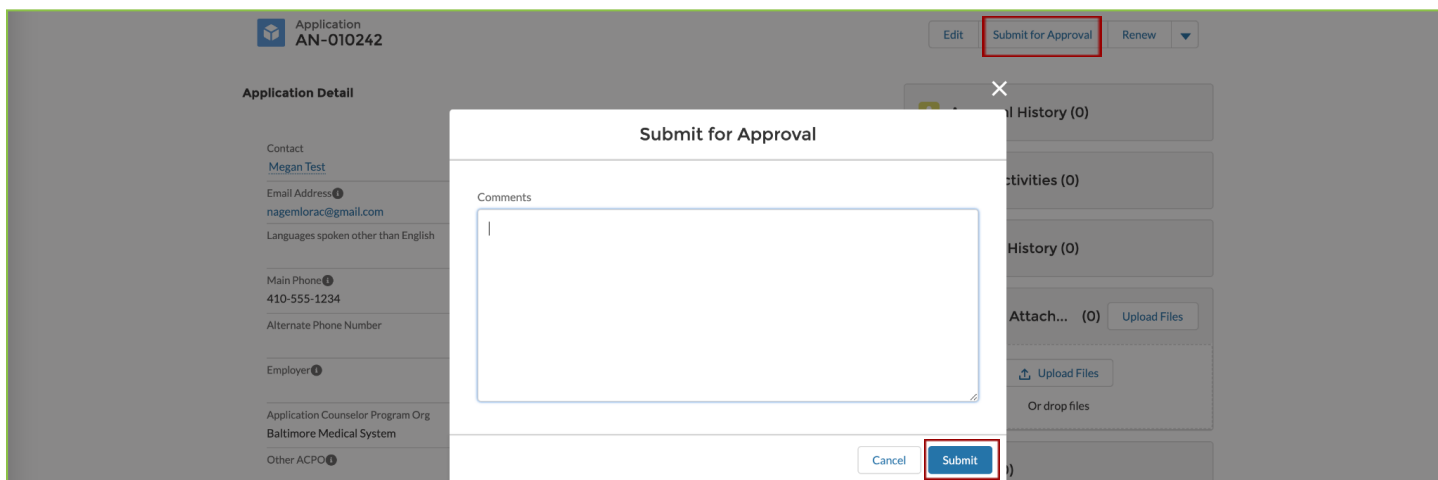
- Click on the "attestations" form name to download the form.
- Print out the form, fill it out, and sign where required. Electronic signatures are permitted.
- Have your employer sign where required.
- Upload a scanned copy of the form in PDF format in the "Upload attachments" section of the application (on the right). Give the original form to your manager for filing with your employee file.

Individual Application Counselor Attestation

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, understand, 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 ☒

9. Submit the application for approval by clicking **Submit for Approval**. This button is located at the top right of your application. A small window will appear. Add any comments, and then click **Submit**.



Application AN-010242

Application Detail

Contact  
Megan Test  
Email Address  
nagemlorac@gmail.com  
Languages spoken other than English  
Main Phone  
410-555-1234  
Alternate Phone Number  
Employer  
Application Counselor Program Org  
Baltimore Medical System  
Other ACPO

Submit for Approval

Comments

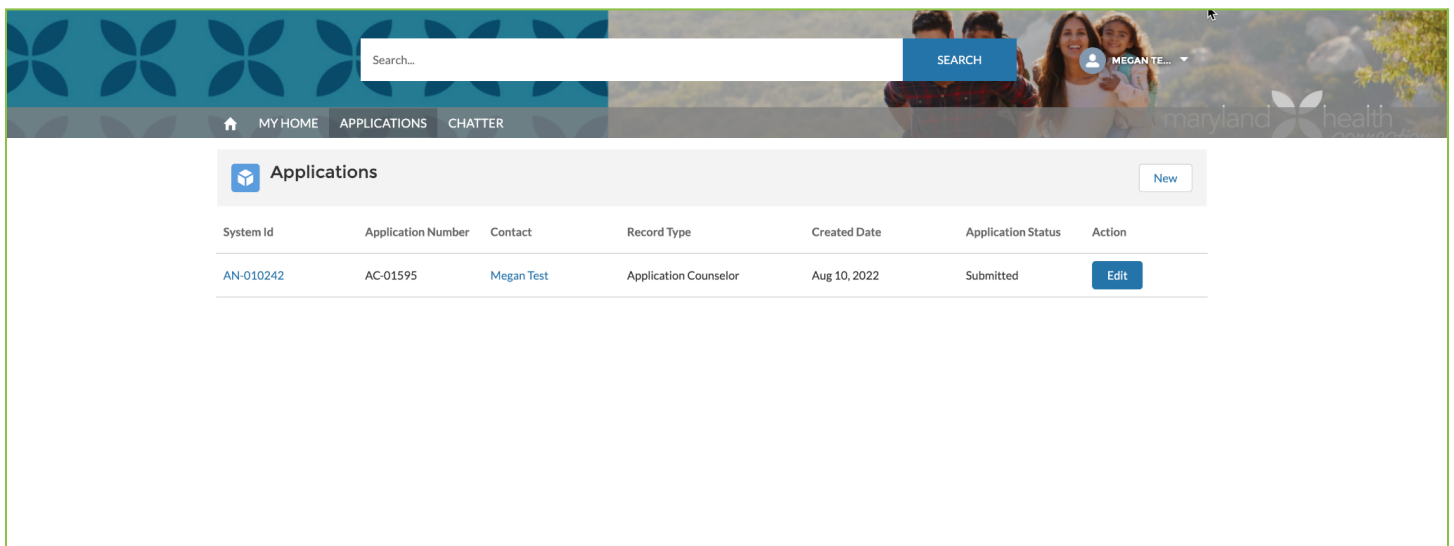
Cancel Submit

# After Application Submission

1. After you have submitted your application, it will appear in your applications tab as “submitted.” Your application will be reviewed within 3-5 business days and you will receive a confirmation email regarding the approval of your application.

Once the application is approved, you should look for a communication from MHC Training Support Team inviting you to create an account and login. You will receive this email within 30 minutes after receiving application approval. ACs & Producers should also expect an email from their Program Manager.

**Note:** You will not be granted access to training with the LMS without an approved application.



Search...

SEARCH

MEGAN TE...

maryland health

Applications

New

System Id	Application Number	Contact	Record Type	Created Date	Application Status	Action
AN-010242	AC-01595	Megan Test	Application Counselor	Aug 10, 2022	Submitted	Edit





## Account Creation

1. 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 interface. On the left, there is a still life image of several purple figs in a dark, rustic metal container, with one fig lying on the surface in front. The Adobe logo and the text "Sign in or create an account" are overlaid on the image. On the right, a white modal window titled "Create an account" is displayed. It includes a link for users who already have an account, options to sign up with social media (Google, Facebook, Apple), and a section for signing up with email. The email sign-up section contains fields for email address, first name, last name, password, and date of birth. It also includes a dropdown for country (set to United States) and a section for terms and conditions. A "Create account" button is at the bottom right of the modal. A small chat bubble icon is visible in the bottom right corner of the page.

**Create an account**  
Already have an account? [Sign in](#)

**Sign up with social**

Or

**Sign up with email**

Email address

First name Last name

Password

Date of birth

Month Year

January

United States

By clicking Create account, I agree that:

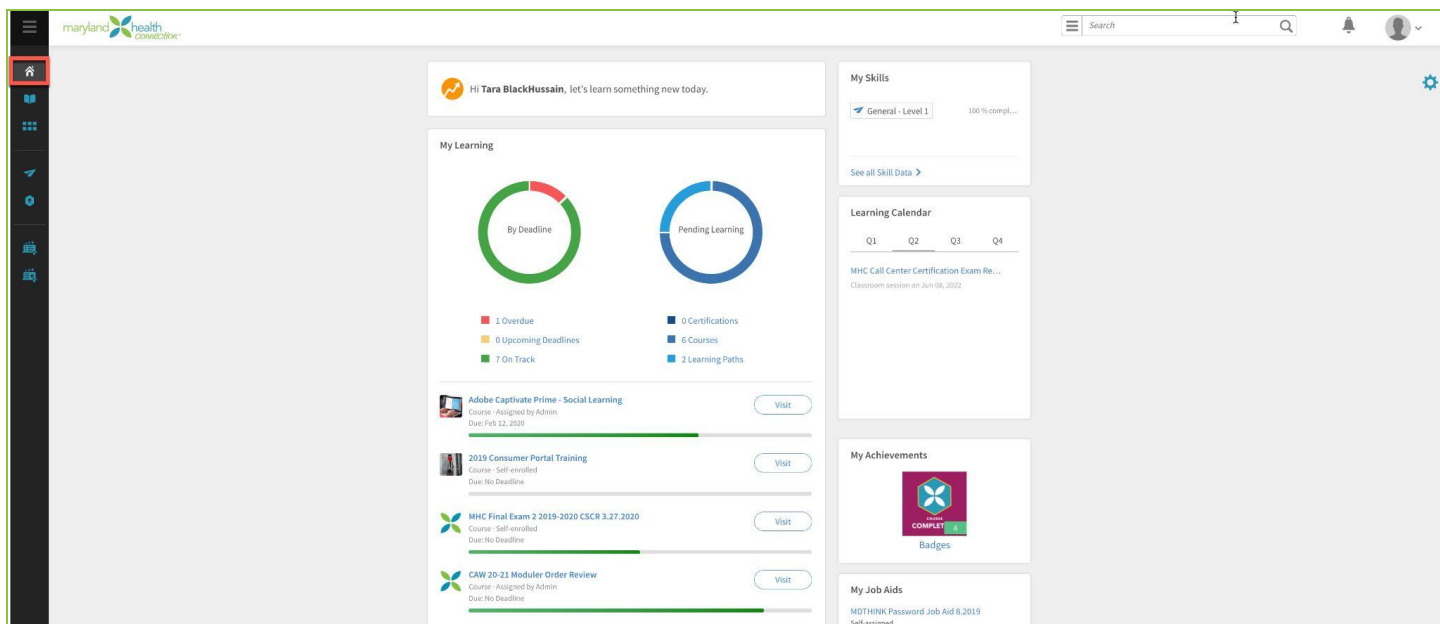
- I have read and accepted the [Terms of Use](#).
- The [Adobe family of companies](#) may keep me informed with *personalized* emails about products and services.

See our [Privacy Policy](#) for more details or to opt-out at any time.

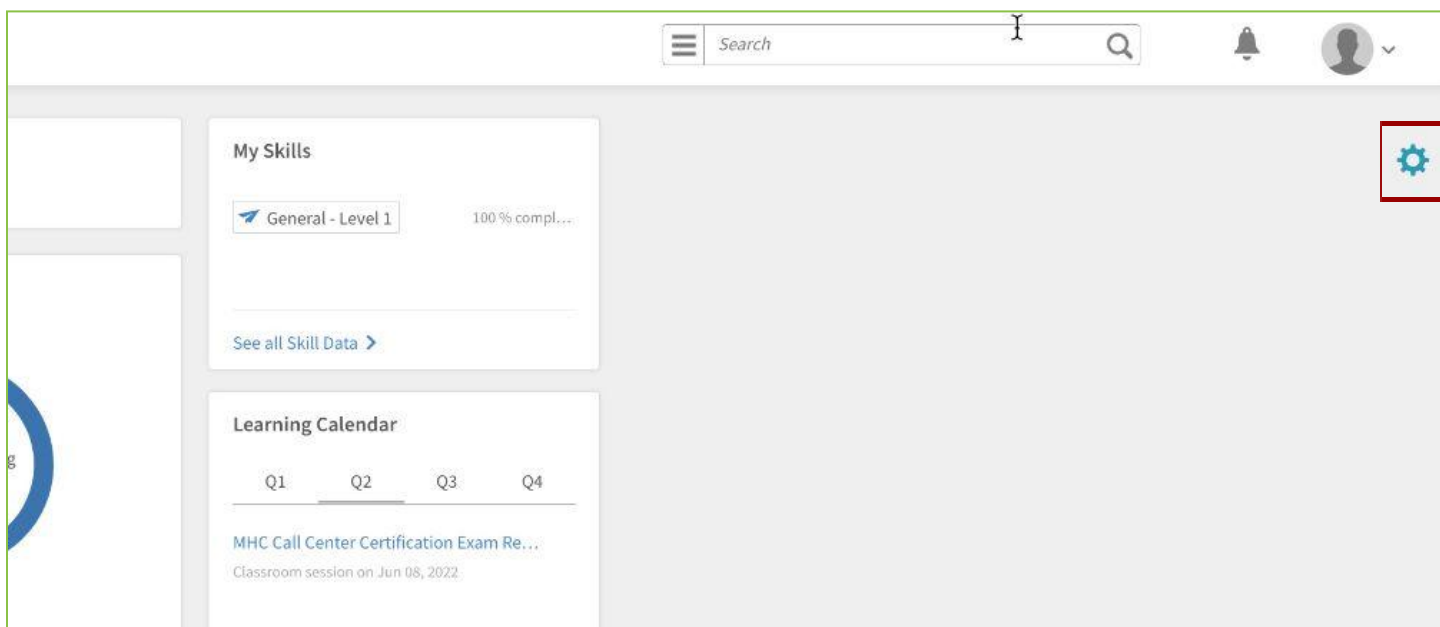
[Create account](#)

# Navigating the Learner Dashboard

1. Upon opening Adobe Learning Manager, you will see your dashboard.

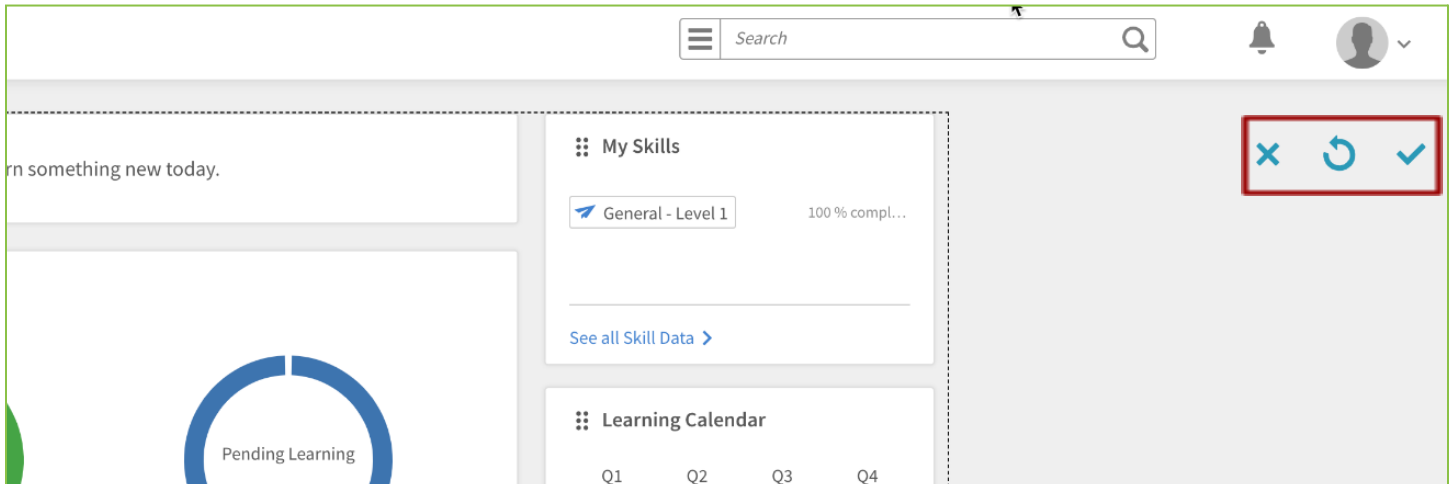


2. The Dashboard helps you organize your training. It can be customized by clicking the gear button in the upper right corner.



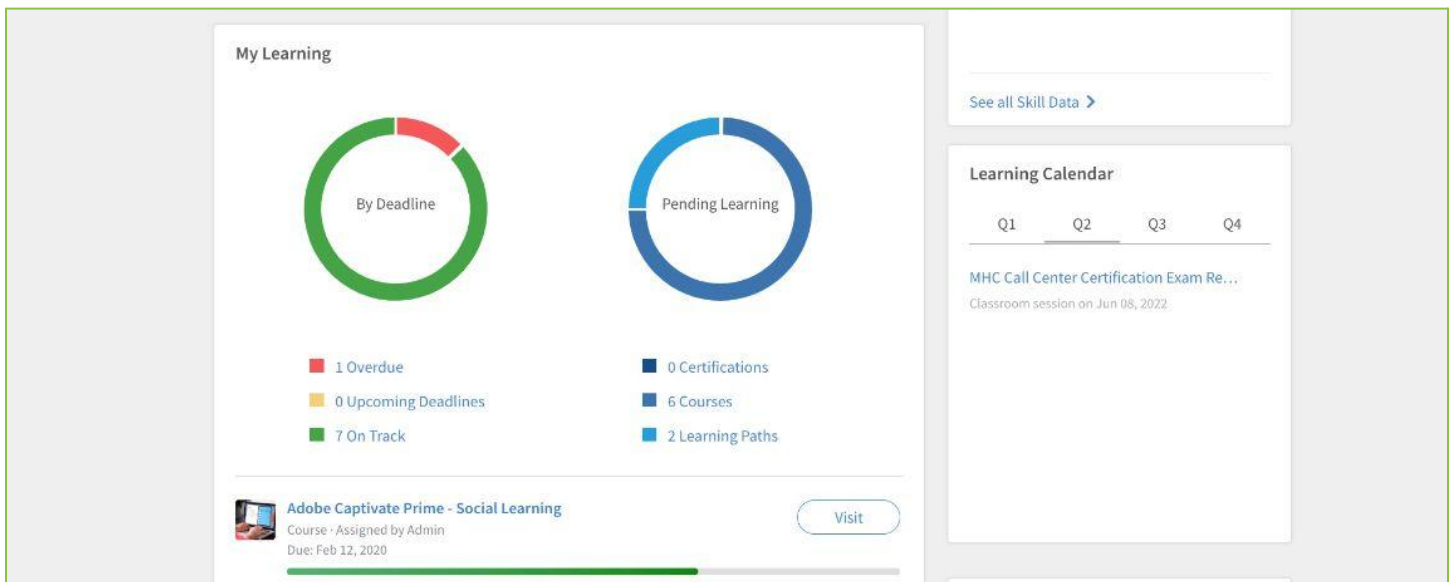
- When you click on the gear button, a dotted line will appear around your profile. Once it does, you can drag and drop the “widgets” (pieces of your profile) around within that space to organize them the way you prefer.

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.

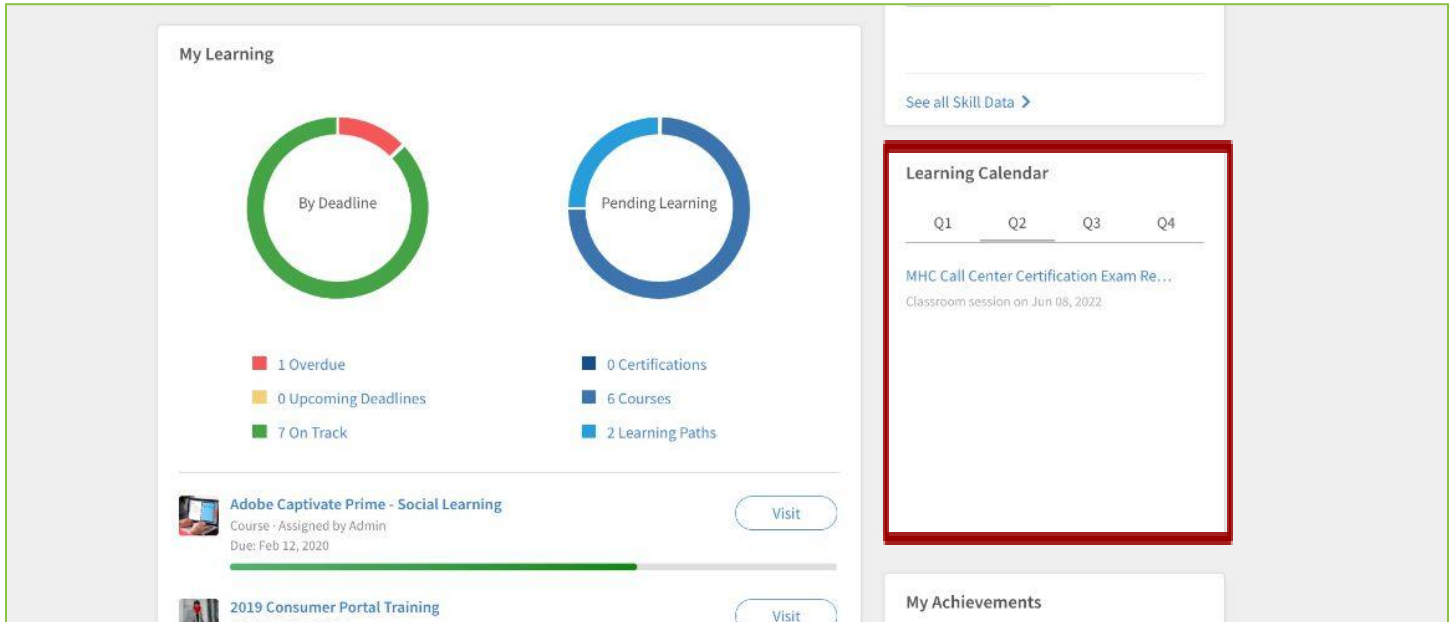


- The “By Deadline” donut on your screen lets you know about training that’s overdue (in red) or nearing a deadline (in yellow). The “Pending Learning” donut on your screen uses shades of blue to let you know about courses and learning programs that have been assigned to you.

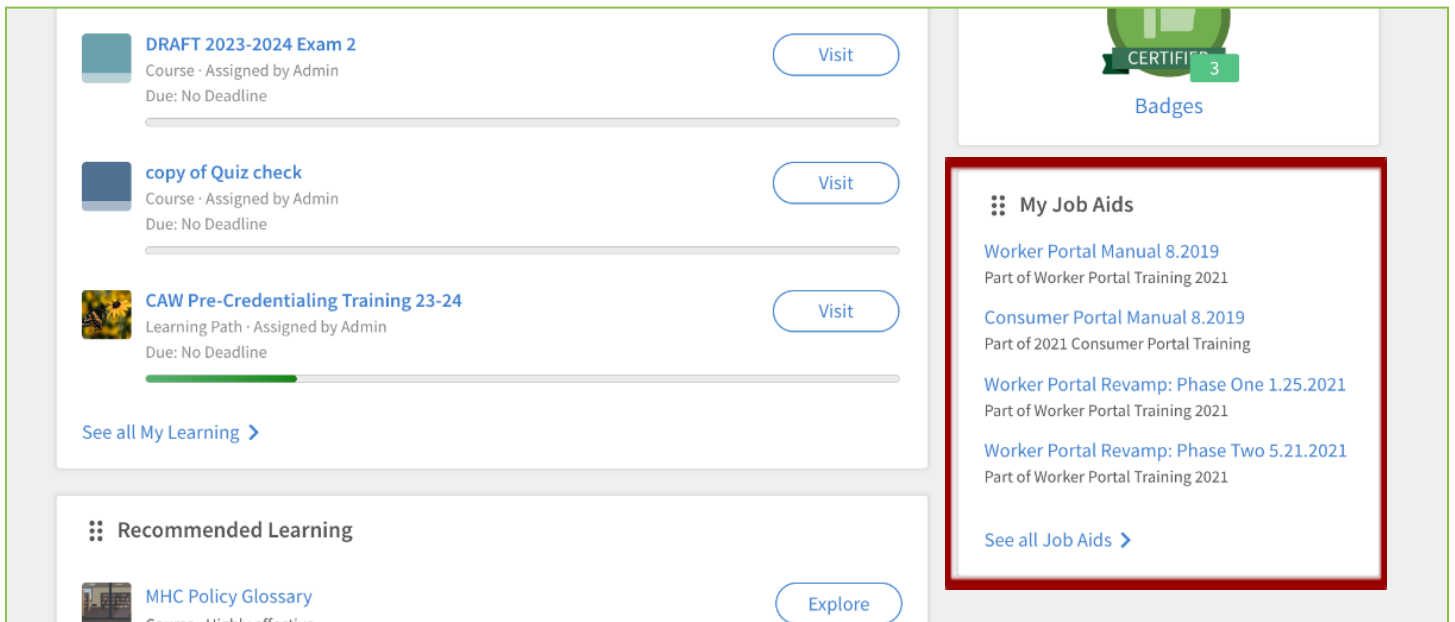
You can launch any of those trainings from the list directly below the donuts. Note that this area contains only training that you are ALREADY enrolled in. If you want to find any other training or job aids available to you, you will use the catalog tab to enroll in training courses and view job aids. You will also find a recommended learning box below the list of assigned trainings.



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



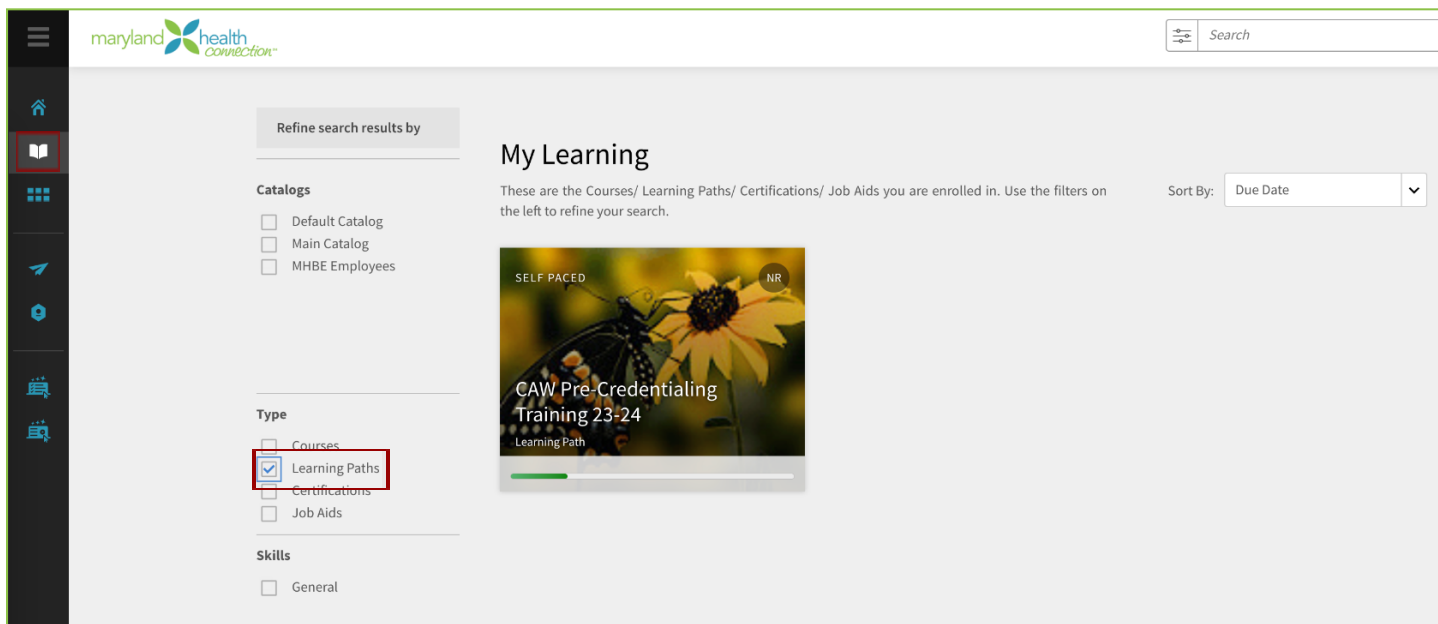
6. Beneath your calendar and across from your recommended training list, you will see the Job Aids widget. This is where you will find any job aids assigned to you.



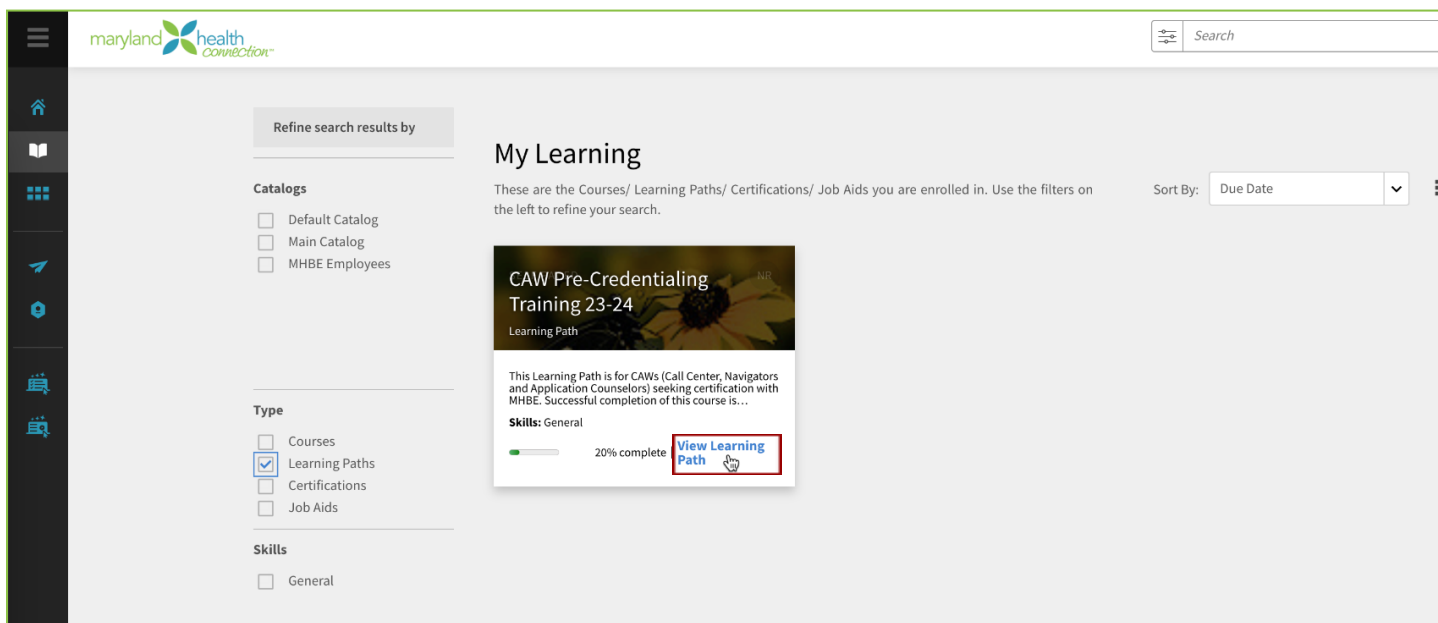
# Enrolling in the Learning Path

1. If you are a new CAW seeking a certification with MHBE, you will have to enroll in the CAW Pre-Credentialing Training Learning Path.

On the left pane, click on your Catalog tab. Under "Type", click the check-box listed as Learning Path.



2. Hover the mouse to the lower right corner of your learning program and click **View Learning Path**.



3. To enroll in the program, under the caw pre-credentialing training, click the blue “enroll” button to start the training modules.

The screenshot shows the 'CAW Pre-Credentialing Training 23-24' Learning Path page. At the top, it says '3 Enrollment(s)' and has a 'Share' button. Below this, there's a description: 'This Learning Path contains the Maryland Health Connection policy training courses (Foundations, Coverage, Subsidies, Medicaid and MHC Application) for 2023-2024. You are required to successfully pass the assessment with an 80% or higher at the end of each course to proceed to the next course.' It also states: 'All courses in this learning path are required to receive completion credit and to earn your completion certificate.' and 'Duration : 4 hrs 18 mins 21 secs'. On the right, there's a sidebar with 'Badges' (a purple badge icon) and 'Skills covered' (General - Level1). The main content area lists three courses, each with a 'REQUIRED' tag and a duration: 'Foundations of Maryland Health Benefit Exchange (MHBE)' (1 hr 9 mins 49 secs, 8 Modules), 'Coverages' (33 mins 17 secs, 4 Modules), and 'Subsidies' (13 mins 15 secs, 3 Modules). A red box highlights the 'Enroll' button in the top right corner.

4. If you need to resume your training another time or day. Go back to the caw pre-credentialing training learning path and click the blue “continue” to pick up where you left off.

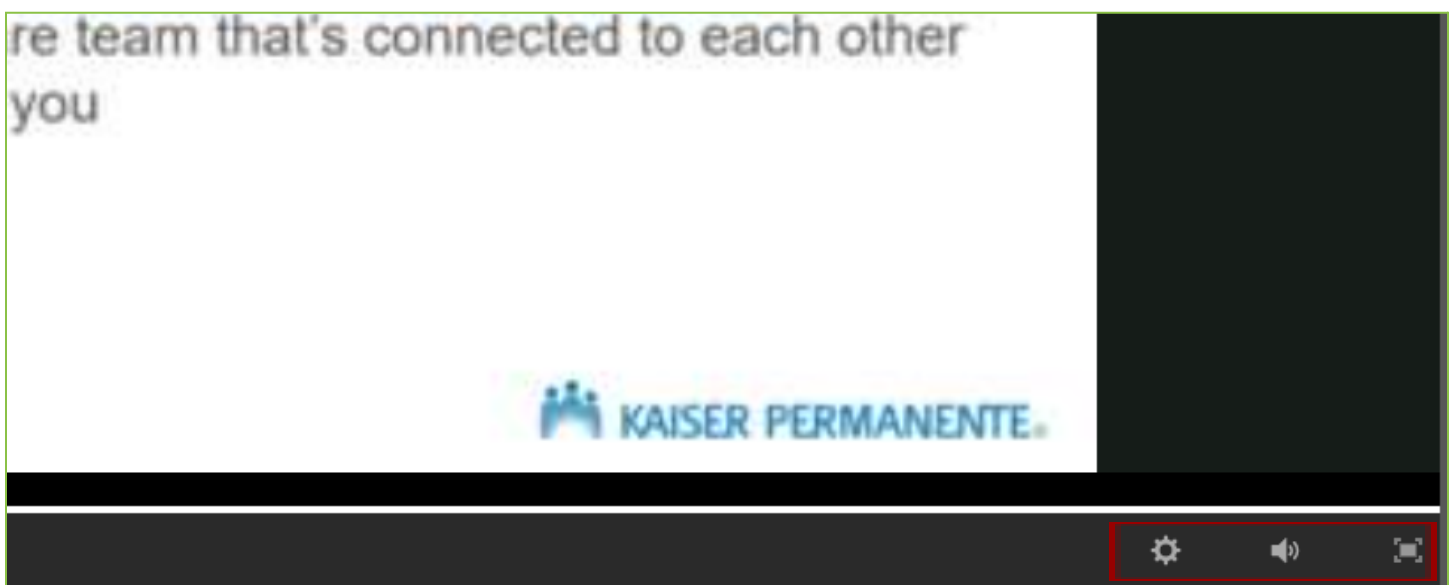
The screenshot shows the 'CAW Pre-Credentialing Training 23-24' Learning Path page, now with a progress bar at 20%. The description and duration remain the same. The sidebar now shows '1/5 Trainings Completed' and 'Skills covered' (General - Level1). The main content area shows the progress of the courses: 'Foundations of Maryland Health Benefit Exchange (MHBE)' is 'Completed', 'Coverages' is 'In Progress', and 'Subsidies' is 'Last Visited 15 mins'. A red box highlights the 'Continue' button in the top right corner.

# Using the Player

1. 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.



2. Once you enter the player, the settings gear, volume, and full screen buttons will be at bottom right.



3. 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 Adobe Learning Manager (ALM) will save them for you.

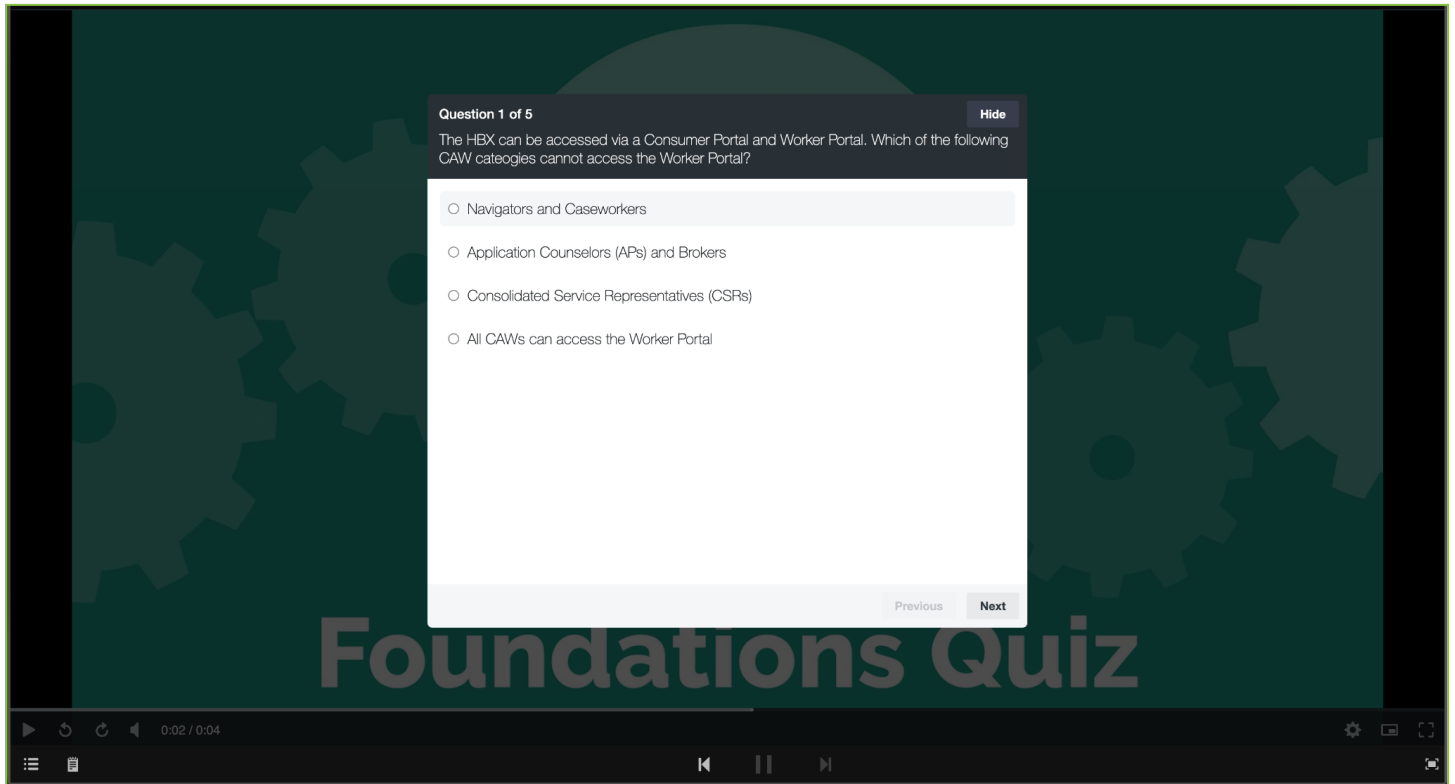


4. Also located at the bottom left of your player is the Table of Contents button.

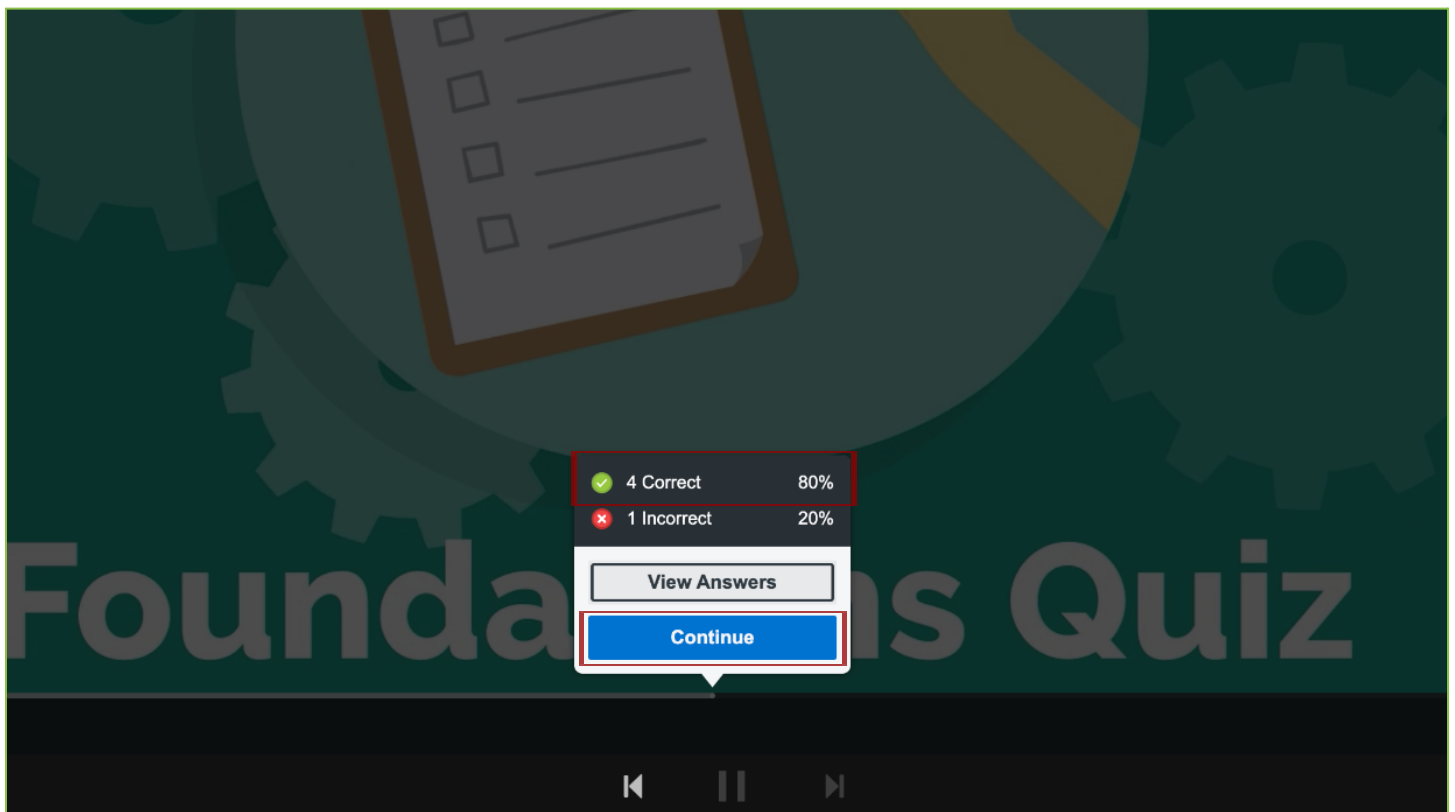




5. During your course, there will be quizzes throughout. Below is an example of the Foundations Quiz.



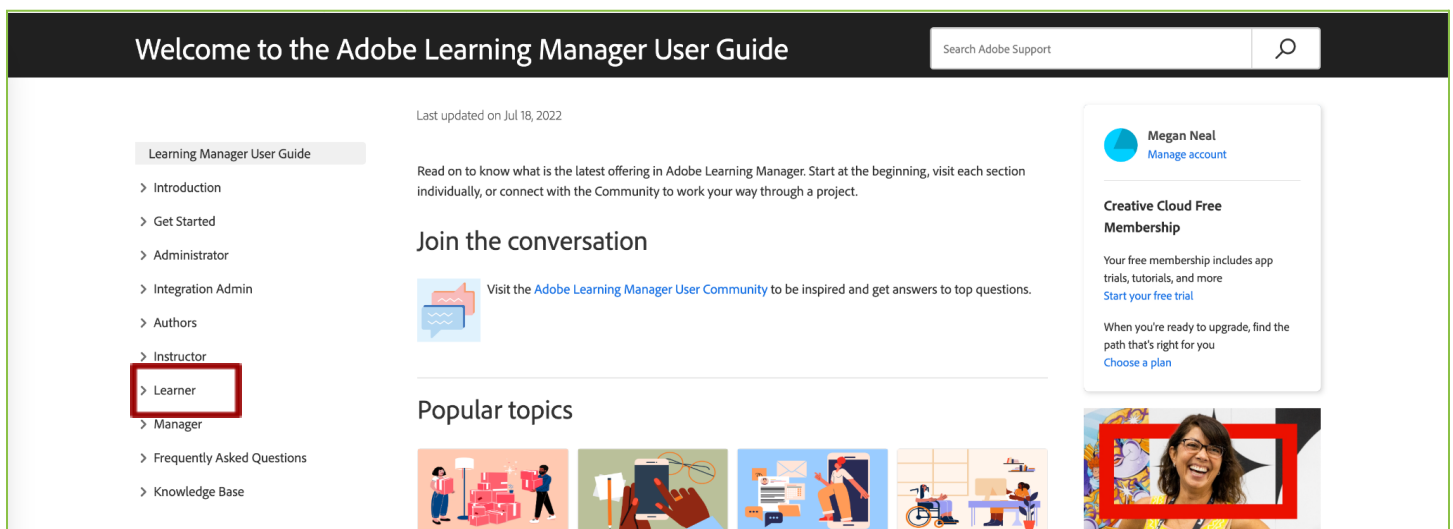
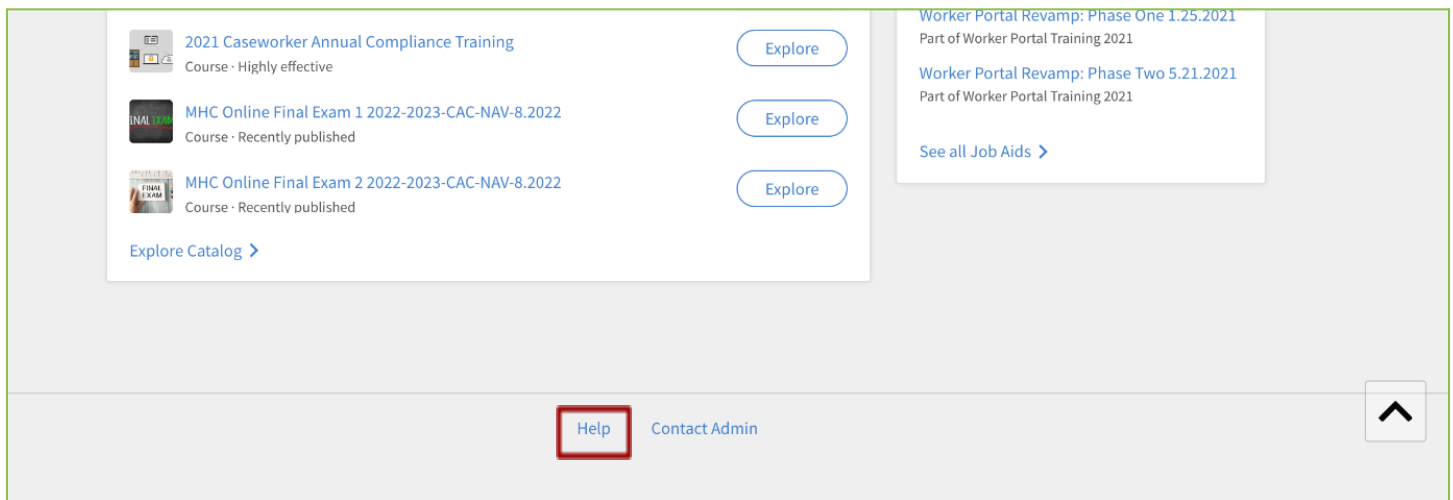
6. After taking the quiz, your score will be displayed. Select **Continue** to move on with the course.



# Help Features

If you need help with any adobe function, clicking Help in the footer (down at the bottom) of the Learner Dashboard will route them to the ALM User Guide. This guide has helpful information on many aspects of the ALM experience, and can help you with many of your questions and concerns.

Choose Learner from the menu on the left side of the screen once you have arrived at the ALM User Guide 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 broker: You should now be prepared to help your clients during the upcoming enrollment period.

If you are a new broker: 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](mailto:mhbe.producers@maryland.gov).

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