



MARYLAND HEALTH CONNECTION

**BROKERS**

STEP BY STEP GUIDE 26-27



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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 2026-2027 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.

**Please Note:** Brokers are required to personally complete the application in Salesforce, the training, the exam, and any required ongoing training as assigned. Brokers may not have someone else complete the training on their behalf.

## Major Training Milestones for the 2026-2027 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 2026-2027 (See Chart below). Required training must be completed within 45 days once your application is approved.

## OE 2026-2027 Training Requirement Chart

| Open Enrollment Training Requirement Chart<br>(X=Required) |                                          |                                   |                                  |                                                |                                         |                                        |
|------------------------------------------------------------|------------------------------------------|-----------------------------------|----------------------------------|------------------------------------------------|-----------------------------------------|----------------------------------------|
| Course                                                     | New Broker:<br>Individual &<br>Small Biz | New Broker:<br>Individual<br>Only | New Broker:<br>Small Biz<br>Only | Returning Broker:<br>Individual &<br>Small Biz | Returning Broker:<br>Individual<br>Only | Returning Broker:<br>Small Biz<br>Only |
| 2026 Pre-Authorization Training Curriculum                 | x                                        | x                                 | x                                | n/a                                            | n/a                                     | n/a                                    |
| 2026 Annual Training Curriculum                            | n/a                                      | n/a                               | n/a                              | x                                              | x                                       | x                                      |
| Final Exam                                                 | x                                        | x                                 | n/a                              | n/a                                            | n/a                                     | n/a                                    |



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



# MHBE Training Account Creation/Application

## Account Creation

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

**Note:** If you already have a MHBE Portal for CAW Registration & Application Account, skip to page 7

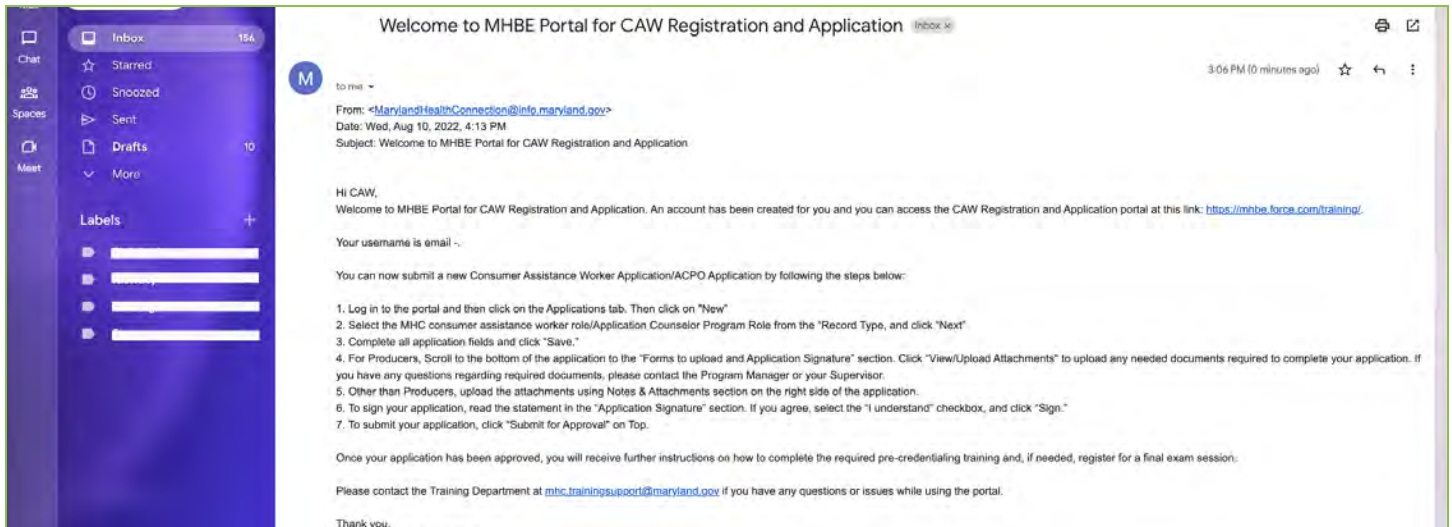
The screenshot shows the login page for the MHBE Portal for CAW Registration and Application. At the top is the Maryland Health Connection logo. Below it are input fields for Username and Password, a Login button, a Remember me checkbox, a Forgot Password? link, and a Register button (highlighted with a red box). To the right, a welcome message is followed by four numbered steps: 1. Create an account using the Register link. 2. You will receive an email which contains a link to complete and submit an application for your consumer assistance worker role. 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. A note at the bottom says: 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.

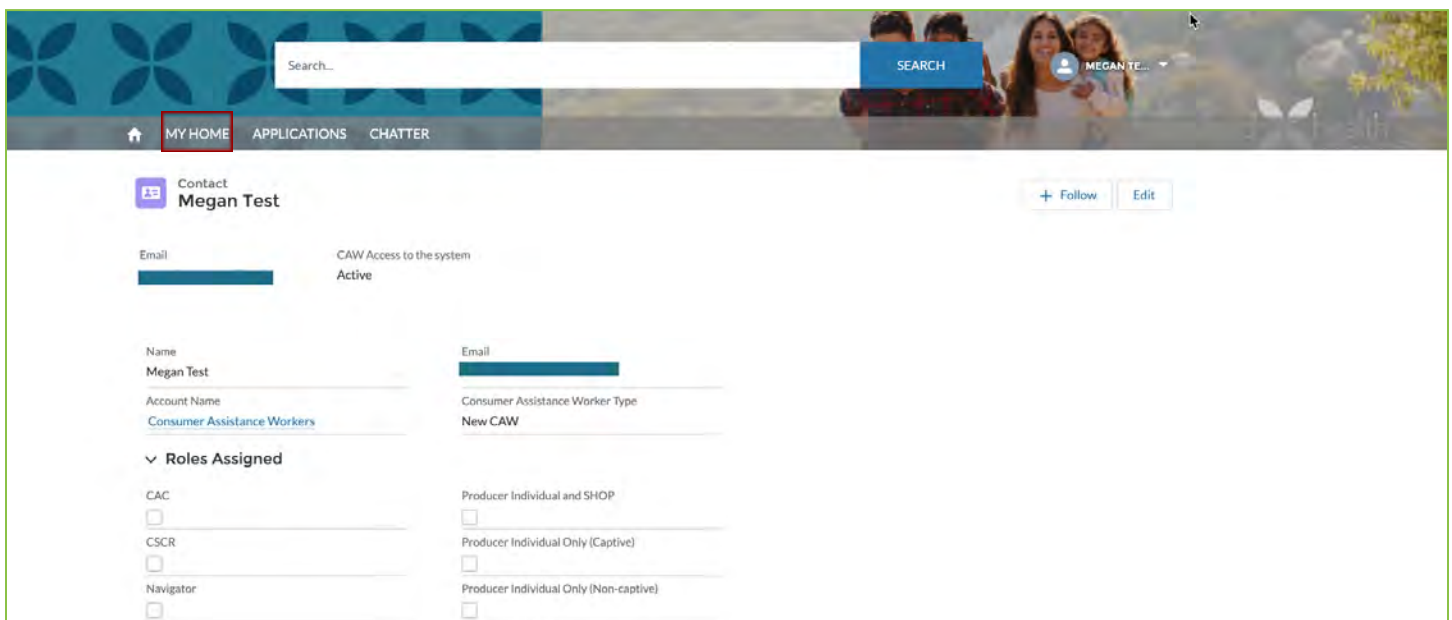
The screenshot shows the self-registration page. At the top is the Maryland Health Connection logo. Below it is a welcome message: "Welcome to MHBE Training Portal Self Registration Page. Please enter all details below to create a new account. Your password should be at least 10 characters long and should 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." Below this are input fields for First Name, Last Name, Email, Password, and Confirm Password, followed by a Submit button (highlighted with a green box).

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.my.site.com/training/> 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.

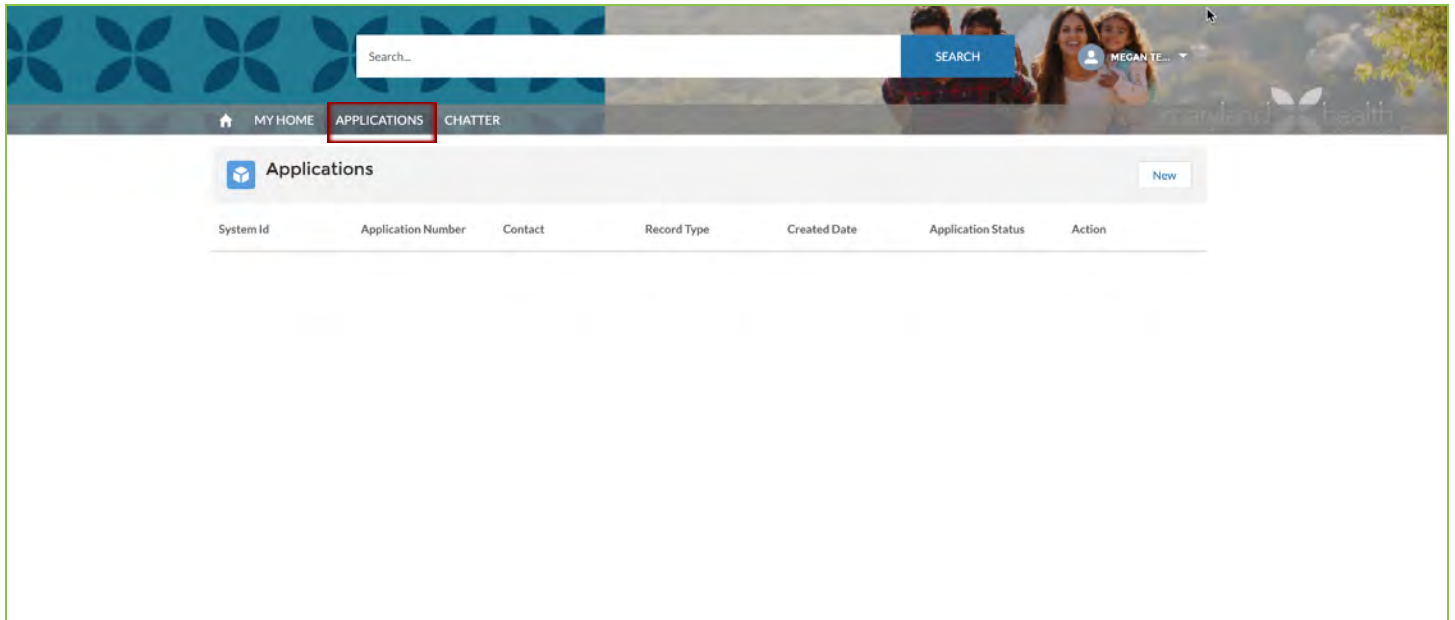


4. Click on the **Home Tab**. This shows an overview of the information you entered when creating an account as well as any CAW roles that were approved and assigned to your account.



# 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

CancelNext

### **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?
- 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 open the Attestation and the Non-Exchange Entity Agreement (NEEA) documents to electronically sign the forms:

**Forms to Upload and Application Signature**

 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.
- Upload a PDF copy of your E & O certificate.
- Upload a PDF copy of your MD license.

[Individual Only \(Non-captive\) Maryland Health Connection Statement Producer Attestation](#)

[Individual Only \(Non-captive\) Non-Exchange Entity Agreement \(NEEA\)](#)

5. Within the Attestation and NEEA documents, 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**



Save Clear

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

**View / Upload Attachments**

**Upload Attachments**

Select Type

Select Attachment Type

Choose File No file chosen Upload

| Action     | Status | Expiration Date | Valid Till |
|------------|--------|-----------------|------------|
| E & O      |        |                 |            |
| MD License |        |                 |            |

- 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.

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

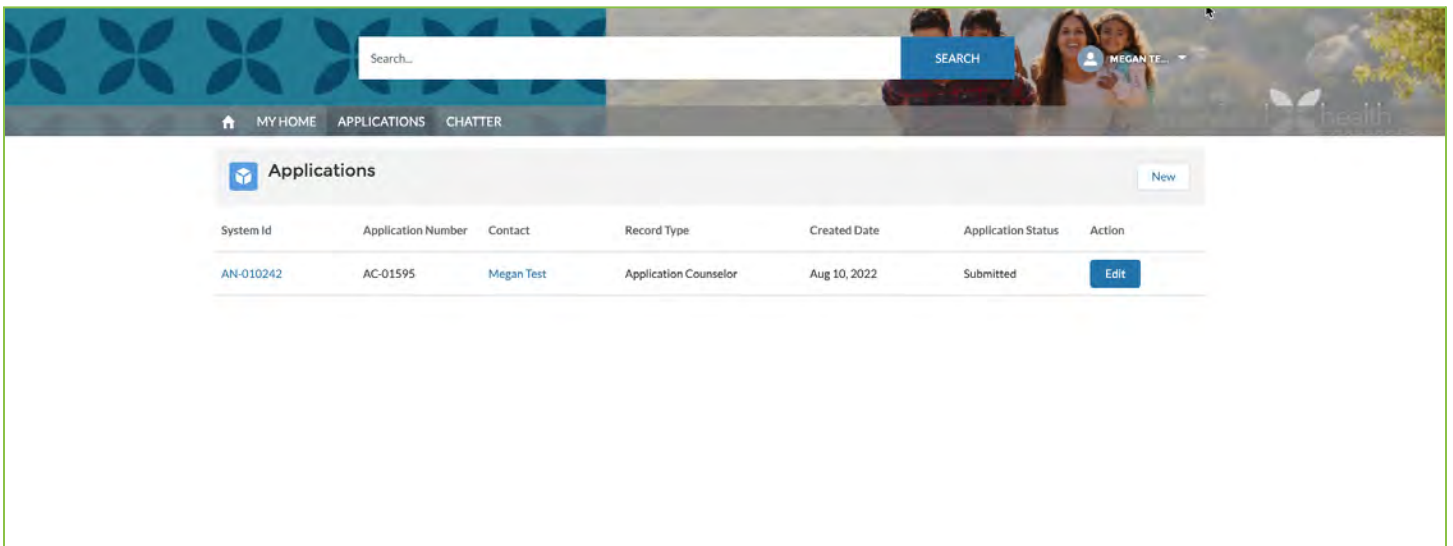
9. Submit the application for approval by clicking **Submit for Approval**. This button is located at the top right of your application. A small window will appear. Add any comments, and then click **Submit**.

# 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 24 hours after receiving application approval. Brokers 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.



The screenshot displays the 'Applications' section of a web application. At the top, there is a search bar and a 'SEARCH' button. Below this is a navigation bar with tabs for 'MY HOME', 'APPLICATIONS', and 'CHATTER'. The 'APPLICATIONS' tab is selected. The main content area shows a table of applications. The table has columns for System Id, Application Number, Contact, Record Type, Created Date, Application Status, and Action. A single application is listed with the status 'Submitted' and an 'Edit' button.

| 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   |

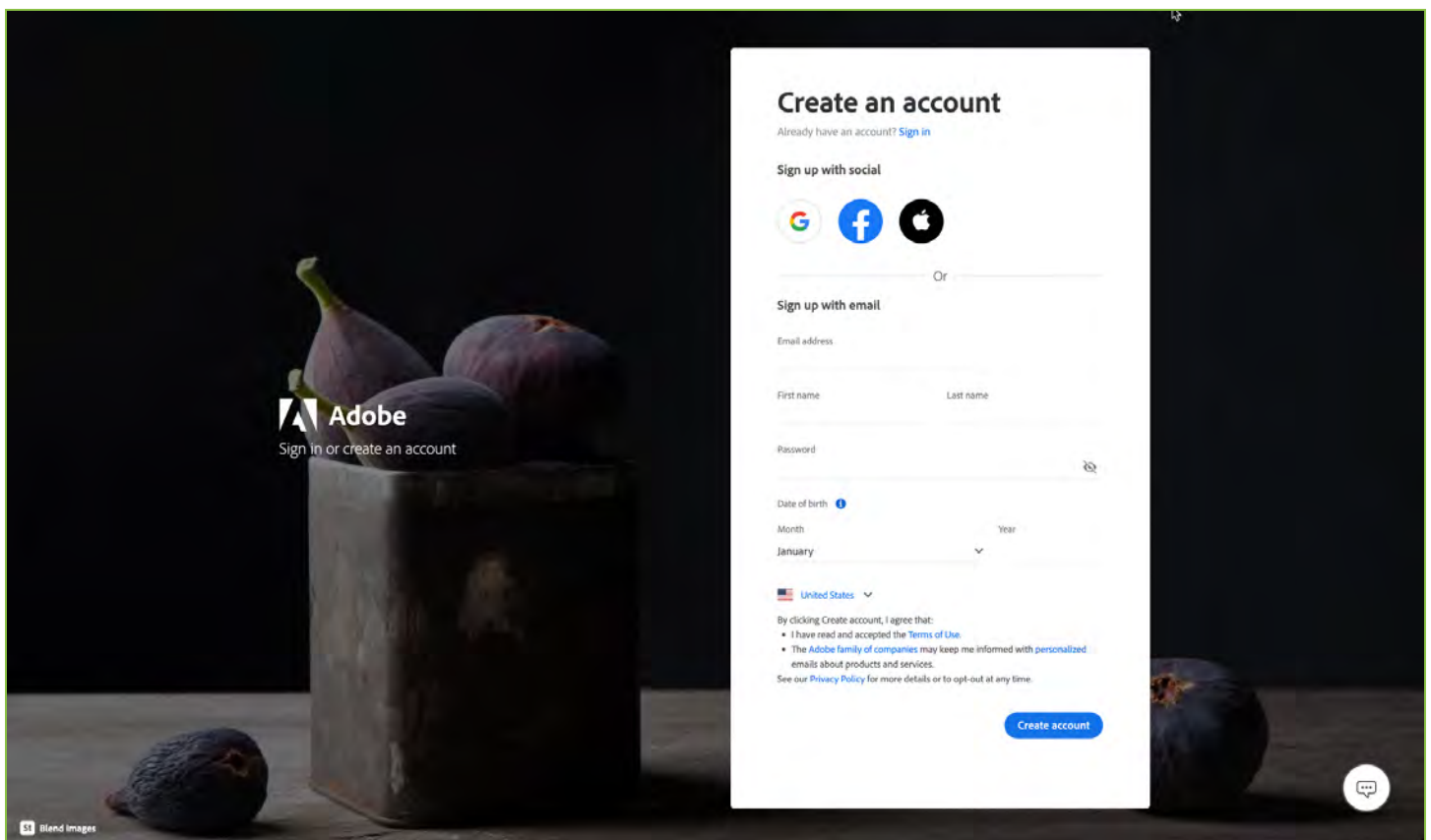


## Account Creation

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.

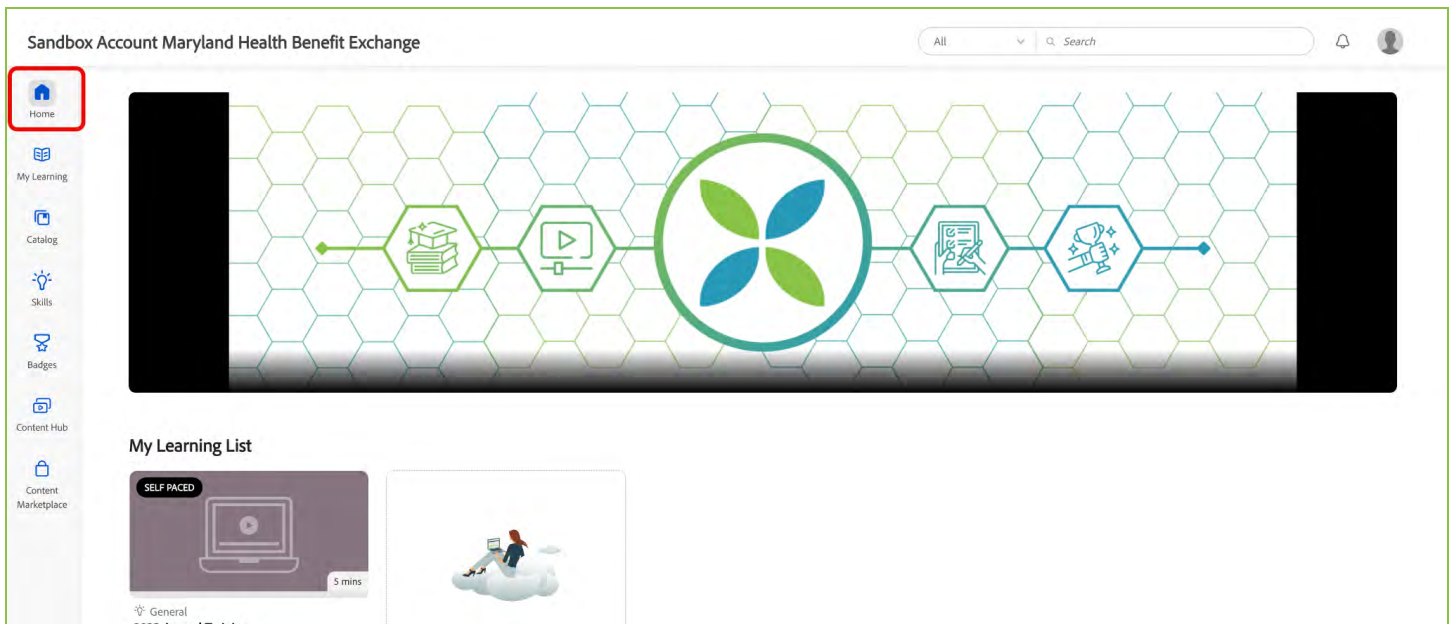
In addition, please make note as you create your account that your password must:

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



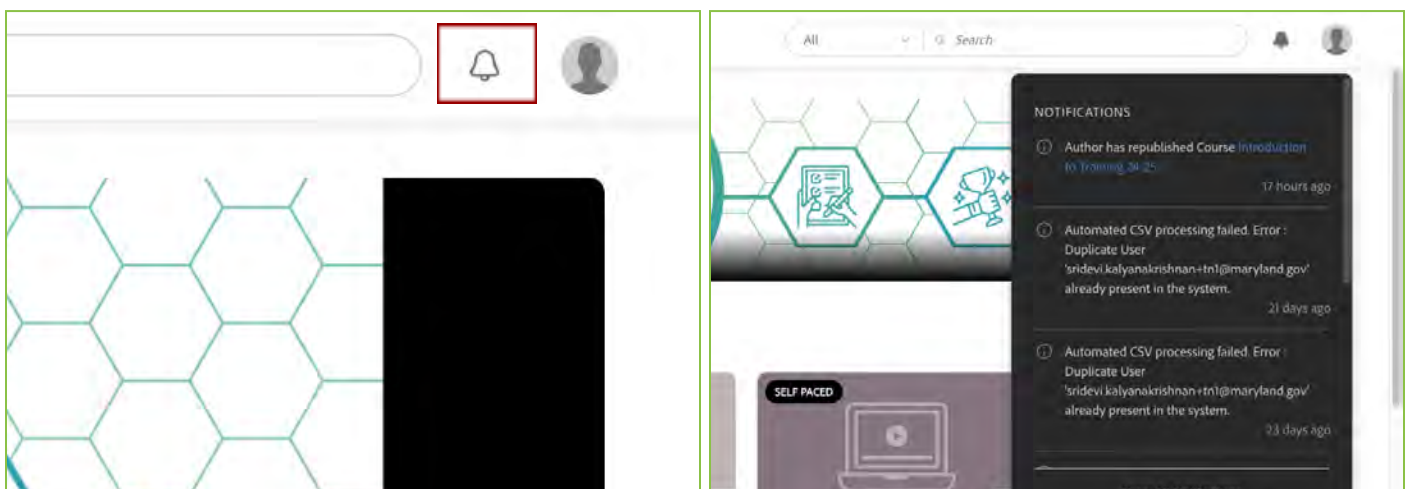
# Navigating the Learner Dashboard

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



2. The bell icon on the top of the dashboard will signal any notifications you may have, including:

- Courses assigned
- Job aids assigned
- Announcements



3. The “Compliance Status” donut on your screen lets you know about training that’s overdue (in red) or nearing a deadline (in orange).

You can launch any of those trainings from the list to the right of the donuts. Note that this area contains only training that you are ALREADY enrolled in.

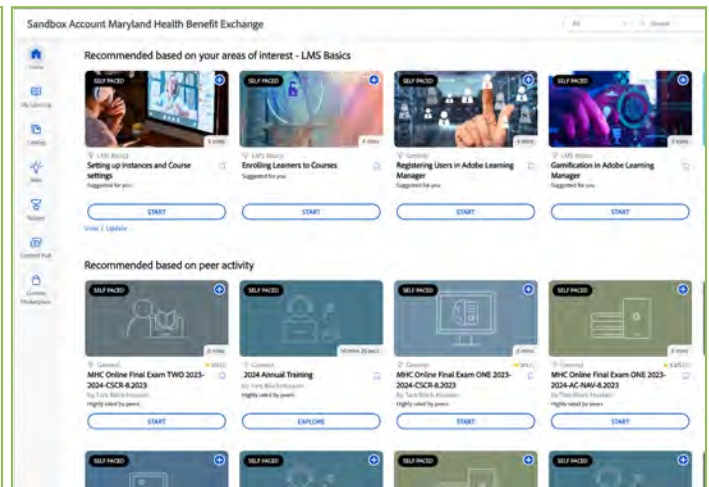
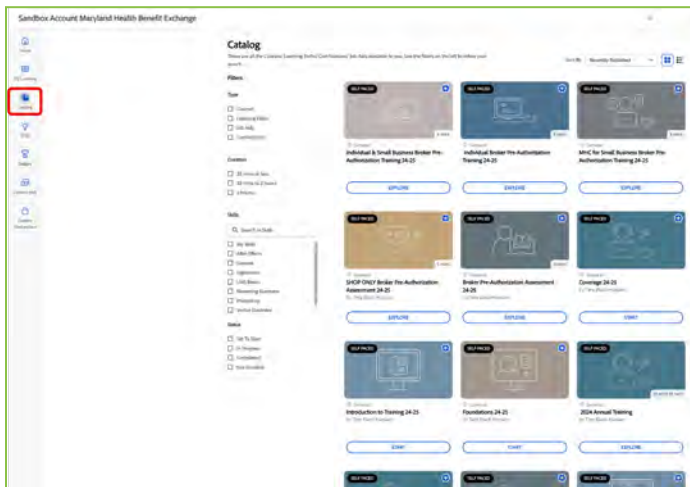
This screenshot shows the 'Compliance Status' section, which is highlighted with a red border. It features a donut chart with a yellow center and a white outer ring, labeled 'Total 1' and '1 On track'. To the right of the chart, there is a list of training items, including 'MHC for Small Business Broker Pre-Aut...' with a due date of '1 May 2025'. Below the chart, there are three categories: 'Overdue (0)', 'Upcoming within next 30 days (0)', and 'On track (1)'. The 'On track (1)' category is highlighted with a yellow dot. The background of the page shows a calendar for March 2025 and a 'View My Learning' button.

4. To the right of the donuts, you will find a calendar of your learning assignments.

This screenshot shows the 'Calendar' section, which is highlighted with a red border. It displays a calendar for March 2025, with the date '21 March, 2025' selected. The calendar shows a grid of days, with the 21st highlighted in blue. Below the calendar, there is a message: 'No sessions planned for this day yet!'. The background of the page shows the 'Compliance Status' section and a 'View My Learning' button.

5. If you want to find any other training or job aids available to you, you can:

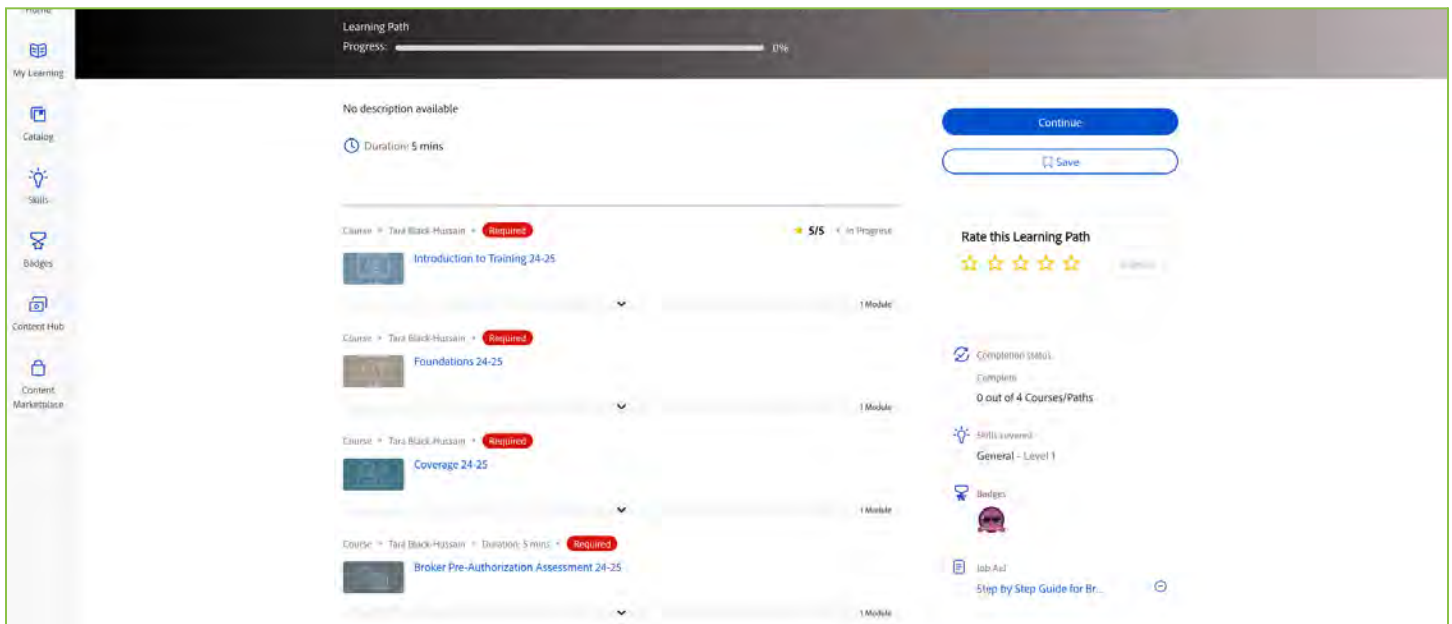
- Use the catalog tab to enroll in training courses and view job aids
- Scroll to the bottom of your dashboard to view recommended trainings based on your area of interests or peer activity



# Pre-Authorization Structure

- The Broker Pre-Authorization Training is split into five courses: Foundations, Coverage, Eligibility, Subsidies, and Application.

**Note:** While visible as a stand-alone course, the Medicaid course is not required for Brokers.



- Each module will end with a five question quiz; to continue to the next module, you must score at least 80% on the quiz.

If you fail the quiz:

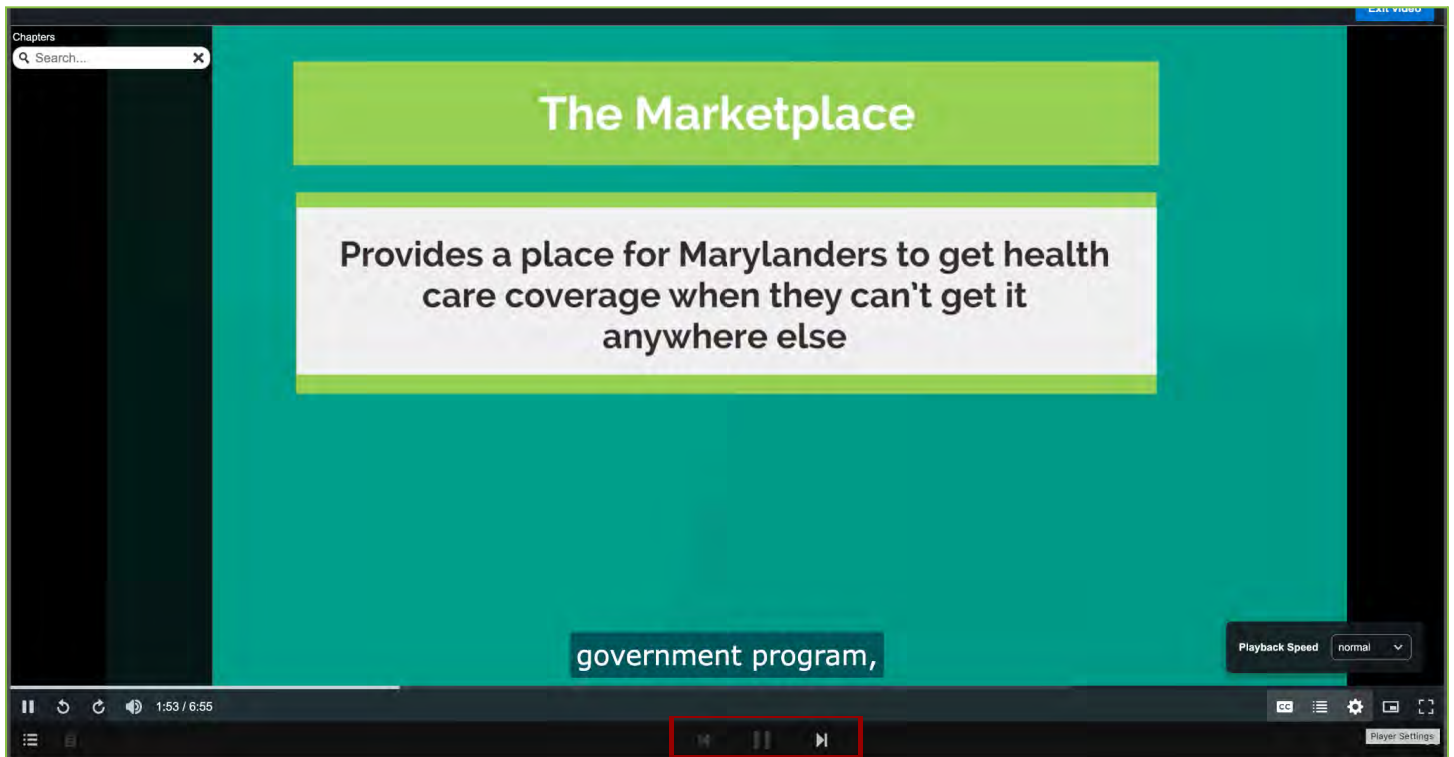
1. Close the assessment window
2. Review the module to find the correct quiz answers
3. Select the Assessment from the content list to retake until you receive a passing score

**Note:** You can tell if a video/quiz has been passed when a check mark appears on the course icon.

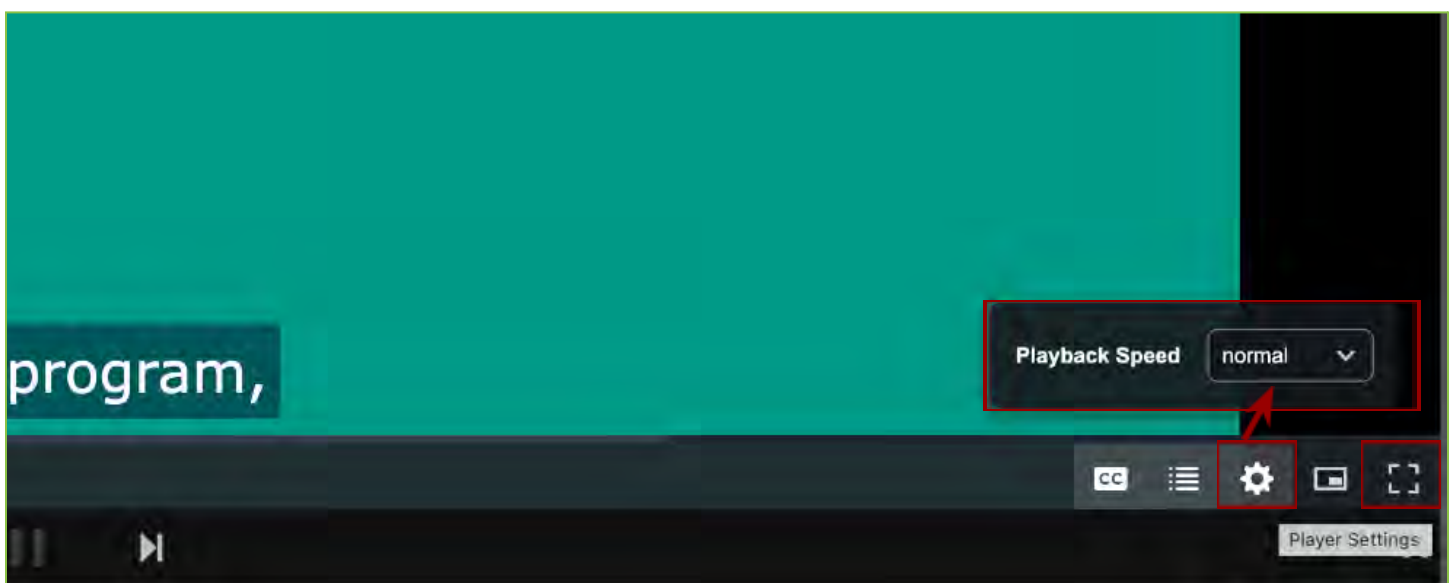


# Using the Player

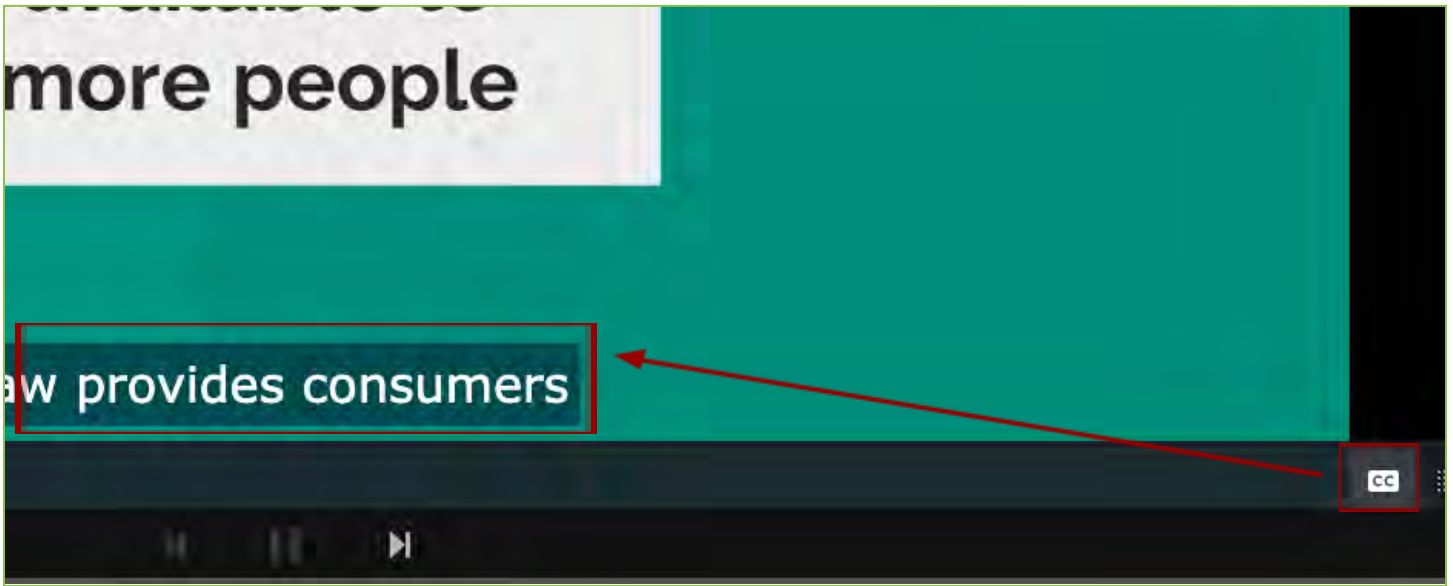
1. Once you start a course, it will appear in the player. This player adapts to fit different types of content and will automatically guide you through all elements of your courses.



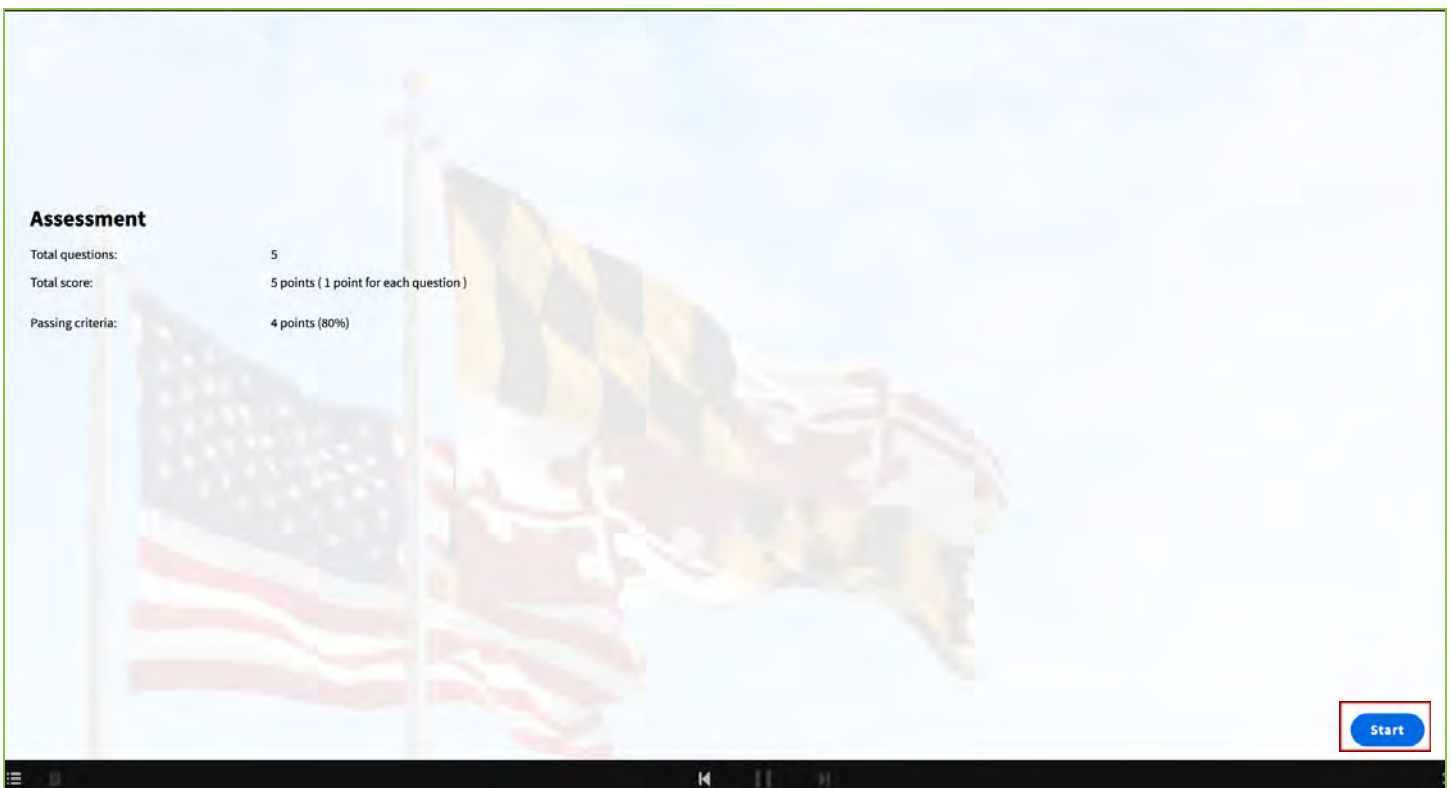
2. At the bottom right corner of the player, you will have the option to open the Player Settings gear to control the Player Speed, or the Full Screen button to expand the screen view.



3. Captions will be inactive by default. To turn on closed captions, use the Closed Captions icon in the bottom right of the player.



4. During your course, there will be quizzes throughout. Below is an example of the Foundations Quiz. Select "Start" to begin the quiz.



5. After taking the quiz, your score will be displayed. Use the forward or X icon to close or move on with the course.

**Foundations Assessment 24-25**

**You have passed the quiz.**

Total questions: 5

Total score: 5 points (1 point for each question)

Passing criteria: 4 points (80%)

Your score: ✔ 4 points (80%)

[Review answers >](#)

Use the ▶ and ✕ button in the player to proceed to the next module or close the quiz respectively.

6. If you fail the quiz, you must close the screen and select “Reattempt” to try again. You must pass the quiz to continue.

**Please note:** The quiz is not the final exam. Please go to the next page for instructions to register in the required final exam.

**You have failed the quiz.**

Total questions: 5

Total score: 5 points (1 point for each question)

Passing criteria: 4 points (80%)

Your score: ⚠ 3 points (60%)

[Review answers >](#)

Use the ▶ and ✕ button in the player to proceed to the next module or close the quiz respectively.

No description available

**Modules** Notes

**Core Content** 5 mins

 SHOP ONLY Broker Pre-Authorization Assessment 24-25 Last Visited 5 mins

SELF PACED [Reattempt](#)

[Continue](#)

[Save](#)

**0/1** Core Content Completed

 Badges

 COMPLETION

 Skills covered

# Registering for the Pre-Credentialing Final Exam

The final exam is a mandatory part of the Broker's credentialing process. **Please note that you may not take the final exam unless you have completed the self-paced Pre-Authorization Learning Path** (Five courses: Foundations, Coverage, Subsidies, Medicaid, and Application.)

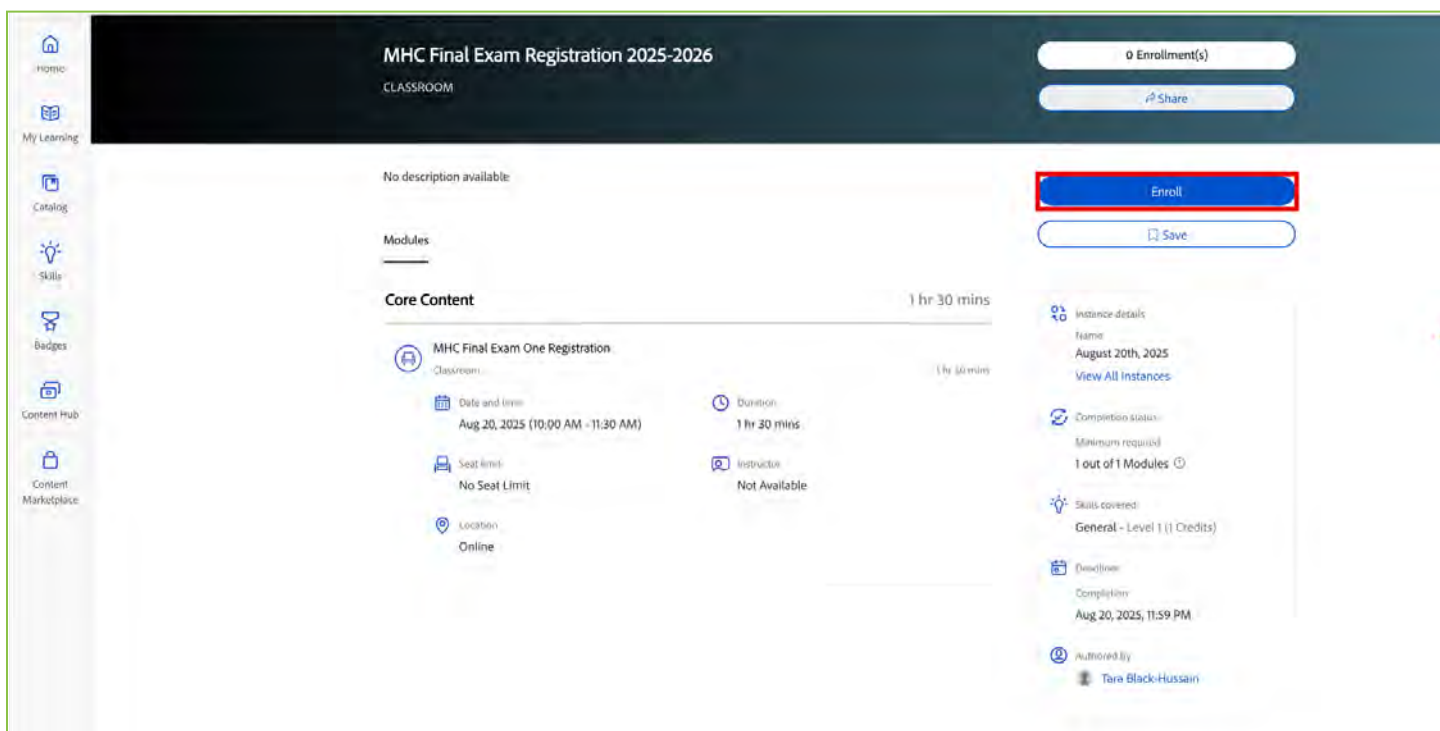
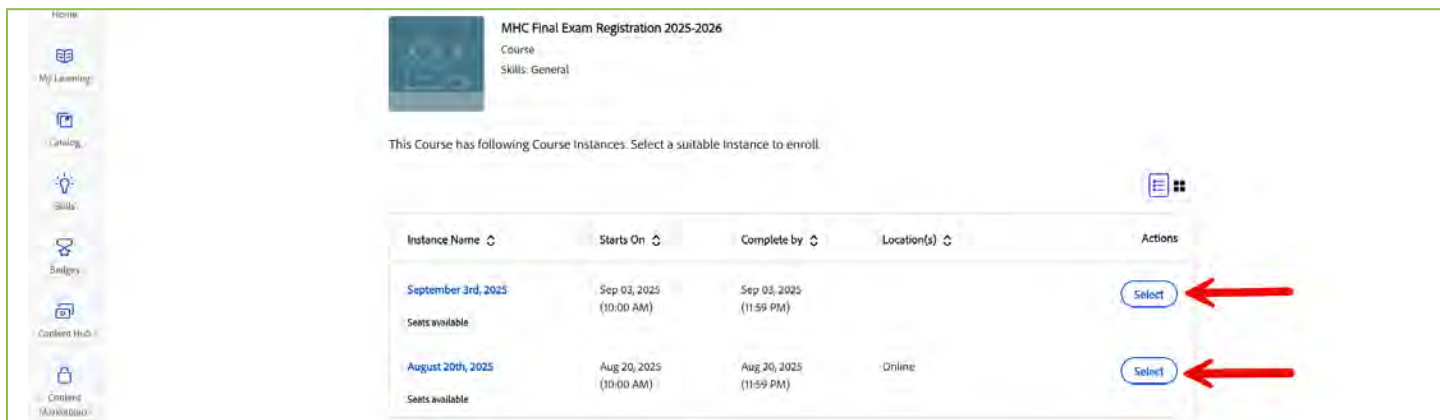
Once you have completed your training, you will need to take the credentialing exam. In order to enroll in the first attempt final exam, click the "Catalogs" option from your Learner Dashboard. All available courses will be listed on this page. Refine your search by checking the Courses check box. The first, second, and third attempt exam session registrations will be available in separate courses listed as MHC Broker Authorization Exam Registration(First Attempt) 26-27, MHC Broker Authorization Exam Registration(Second Attempt) 26-27, and MHC Broker Authorization Exam Registration(Third Attempt) 26-27.

Please follow the steps below to register.

## 1. To register for a first attempt session:

- Open the learner catalog, refine your search for courses. The registration is listed as MHC Broker Authorization Exam Registration(First Attempt) 26-27. Click the "Explore" button.
- Select the exam instance date that you would like to take the online exam and click the blue "Enroll" button.

The screenshot shows a web interface for a learner catalog. On the left is a sidebar with navigation icons for Home, My Learning, Catalog, Skills, Budget, and Community Hub. The main area displays search results for "mhc final exam registration 2025-2026". There are 12 matches. A filter panel on the left shows "Type" with "Courses" selected, and "Duration" with "30 mins or less", "30 mins to 2 hours", and "2 hours+" options. The search results are sorted by "Relevance". Three course cards are visible: "MHC Final Exam Registration 2025-2026" (1 hr 30 mins), "MHC First Attempt Exam Registration 23-24" (1 hr 30 mins), and "MHC Online Final Exam THREE 2023-2024-CSCR-8.2023" (6 hours). Each card has an "EXPLORE" button. The "EXPLORE" button for the first course is highlighted with a red rectangle.



2. If you were unable to achieve a passing score on your first attempt exam, you will need to register for a second attempt session:

- Open the learner catalog, refine your search for courses. The registration is listed as CAW MHC Broker Authorization Exam Registration(Second Attempt) 26-27. Click the "explore" button.
- Follow the same enrollment steps as first attempt registration for the second and third attempt exams.

**Note:** Do not register for a second or third attempt until you receive previous attempt scores.

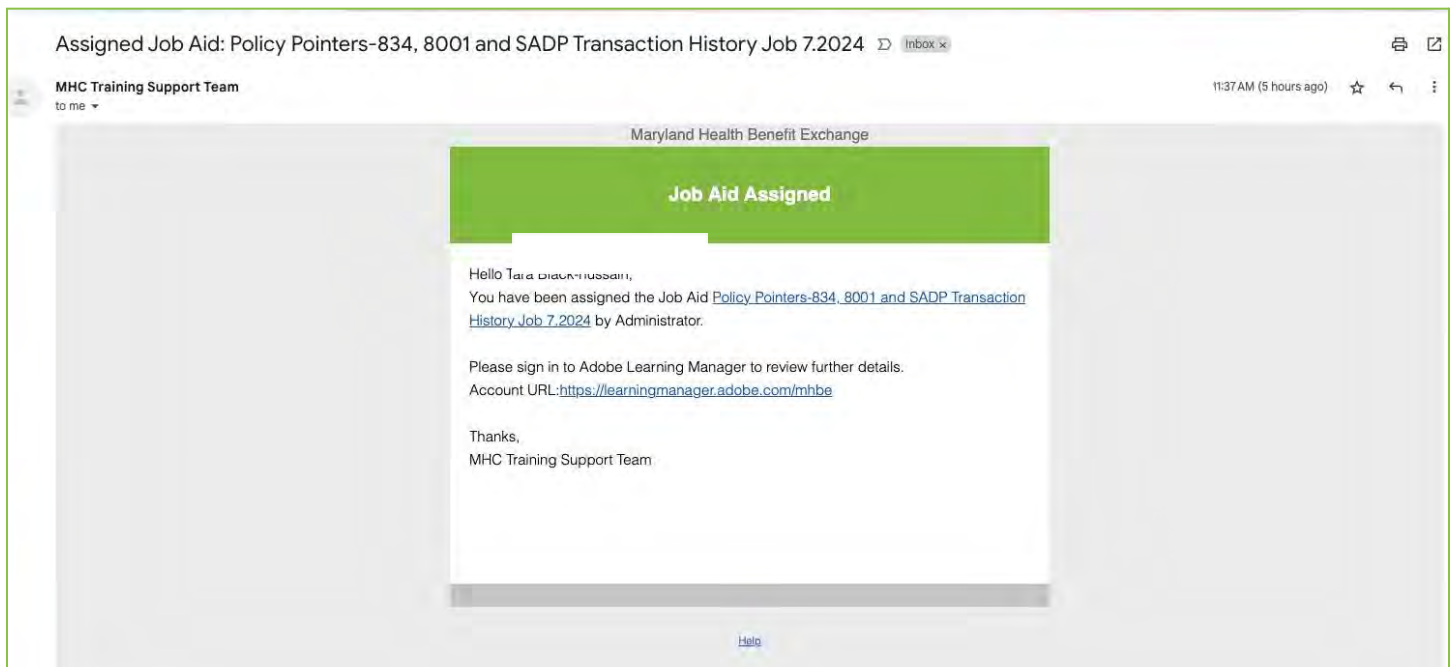
# Job Aids

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The Maryland Health Benefit Exchange will be assigning:

- Policy pointers
- Manuals
- Guides
- System updates
- Job aids

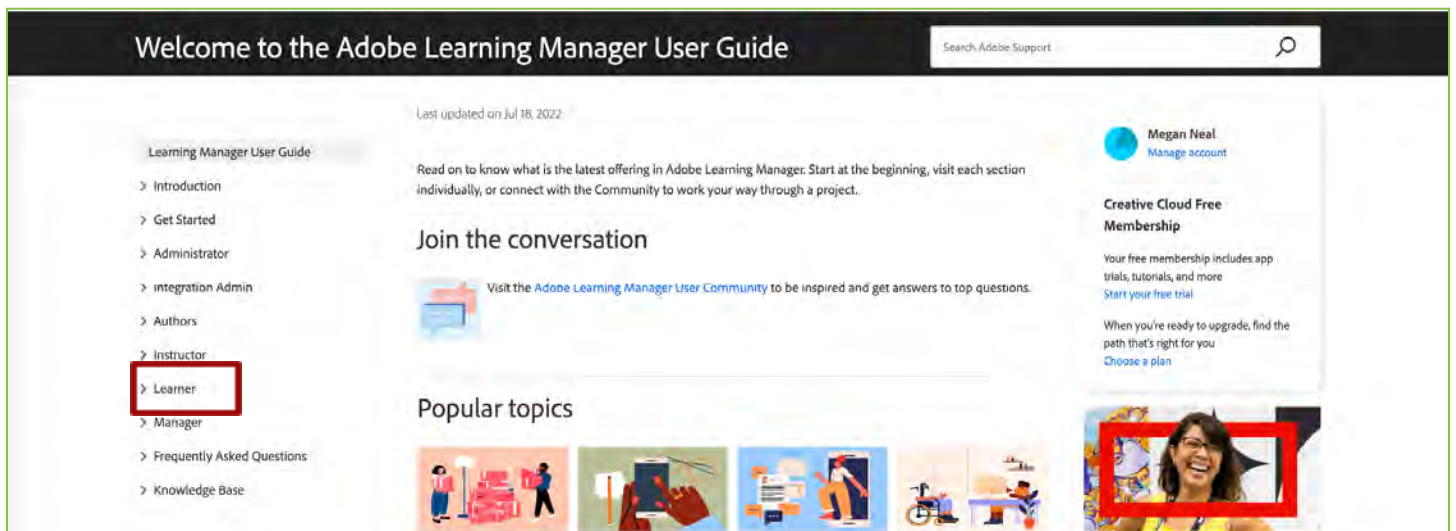
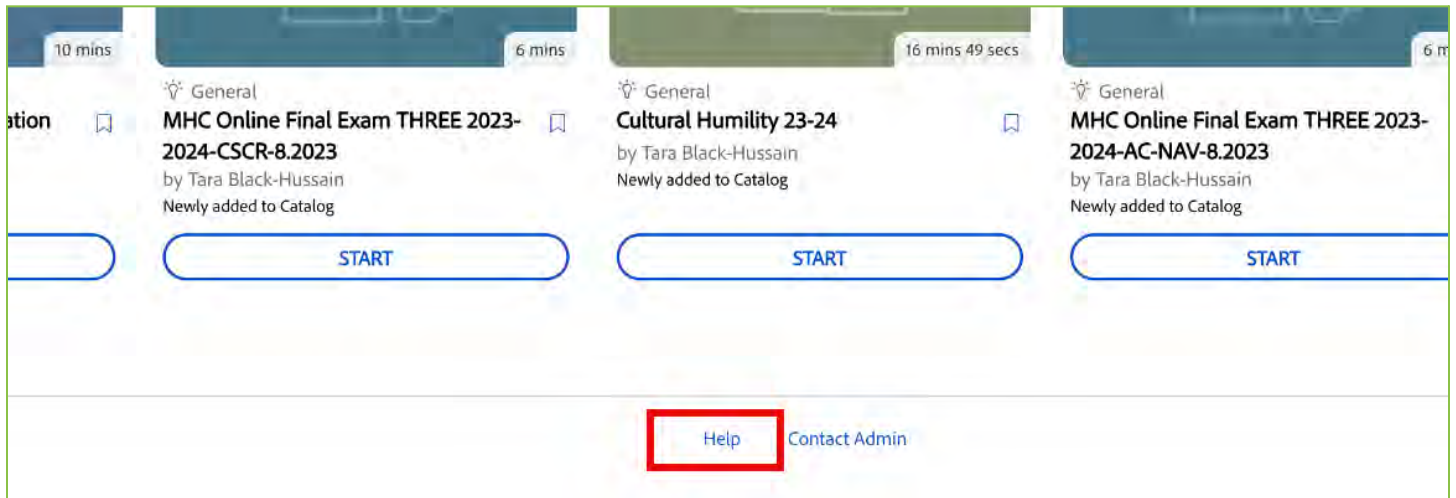
All of these documents will be added to the Job Aids section in ALM and assigned as they become available. They are not required training courses but are important documents as they may pertain to your role with Maryland Health Connection.



# 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! After passing the exam, you have 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: If you have completed all of the requirements, you should expect to receive your authorization letter & Broker Portal credentials (unless Small Biz only) from us within a week.

If you have not received your authorization letter & Broker Portal credentials from us *after a week* of completing all of the authorization requirements, please email us at [mhbe.producers@maryland.gov](mailto:mhbe.producers@maryland.gov).

**DO NOT TRY TO CREATE YOUR OWN BROKER PORTAL ACCOUNT.** This will cause issues with the creation of your Broker Portal.

Once you receive your emails from us, you should be all set to help your clients during the upcoming enrollment period.