

Becoming a CAC or Navigator in Wisconsin

Part 1: CAC and Navigator Certification Process

Fall, 2022



Becoming a CAC or Navigator



CMS.gov | Enterprise Portal

Wisconsin Requirements

1. Complete 16 credit hours of pre-licensing training and receive a certificate verifying completion.
2. Take and pass the Navigator Exam 22-14.
3. Navigators Only - Complete finger printing and background check processes.
4. Complete registration or licensing process with the Office of Commissioner of Insurance.

Federal/CMS Requirements

1. Complete the registration process with CMS.
2. Complete the annual CAC or Navigator Training on the MLMS Portal.

Information Specific to Tribal Nations in Wisconsin

- CMS/Federal requirements sometimes apply to assisters located at tribal nations and working under their jurisdiction.
 - Only if an assister wishes to use the title Certified Application Counselor or Navigator must they complete the federal training on the MLMS portal.
- Assisters located at tribal nations and working under their jurisdiction do not have to complete the pre-licensing training or pass the Navigator Exam required under Wisconsin law.
- See end of slide deck for more detailed information.

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Federal/CMS Requirements



Using the CMS Enterprise Portal

CMS.gov | Enterprise Portal

Applications

Help

About

You must use the [CMS Enterprise Portal](#) in order to access assister training on the Marketplace Learning Management System

CMS provides extensive instructions on how to use the portal in [Quick Reference Guide PY 2023 FFM Registration with ID Verification](#)

Login **Login with PIV Card**

CMS.gov | Enterprise Portal

User ID is a required field

Password is a required field

I agree to the [Terms & Conditions](#)

Login

Forgot your [User ID](#) or your [Password](#)?
Need to [unlock](#) your account?

[New User Registration](#)

How can I help you?

Returning Navigators & CACs - CMS Enterprise Portal

1. Navigate to the CMS Enterprise Portal at <https://portal.cms.gov/>
2. Enter your FFM Credentials (User ID and Password) from last year
3. Review and Agree to the Terms & Conditions and click login
4. In 2022, you will be required to add an additional layer of security called Multi-Factor Authentication. You will need to use MFA each time you log into the CMS Portal. For help with this process check out the [Quick Reference Guide: FFM Registration with ID Verification for Assisters](#) from CMS.

Login: Returning Assisters

If you are a **returning** Assister, follow these steps to determine if you need to complete the Identity Verification process.

1

CMS.gov | Enterprise Portal

User ID

Password

I agree to the [Terms & Conditions](#)

Login

[Forgot your User ID or your Password?](#)
[Need to unlock your account?](#)

New User Registration

New Navigators or CACs - CMS Enterprise Portal

1. Navigate to the CMS Enterprise Portal at <https://portal.cms.gov/>
2. Create a CMS Portal Account by clicking the New User Registration Button
3. Review and Agree to the Terms & Conditions and click Login
4. CMS provides extensive instructions on how to use the portal in [Quick Reference Guide PY 2023 FFM Registration with ID Verification](#)
5. You will be requesting access to the **Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access**

Login Login with PIV Card

CMS.gov | Enterprise Portal

User ID is a required field

Password is a required field

I agree to the [Terms & Conditions](#)

Login

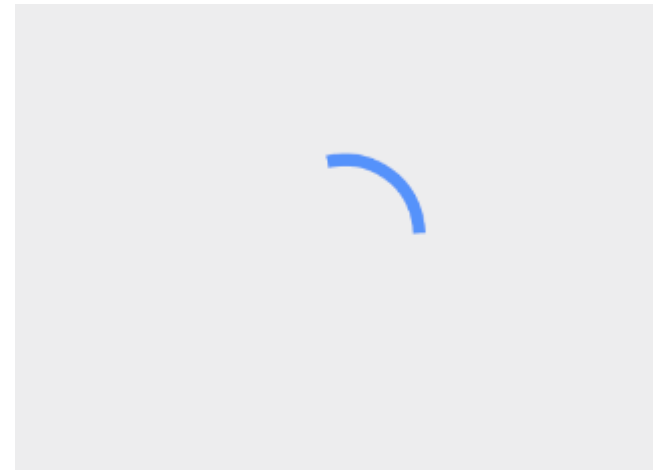
Forgot your [User ID](#) or your [Password](#)?
Need to [unlock](#) your account?

New User Registration

CMS Enterprise Portal – Loading Issue

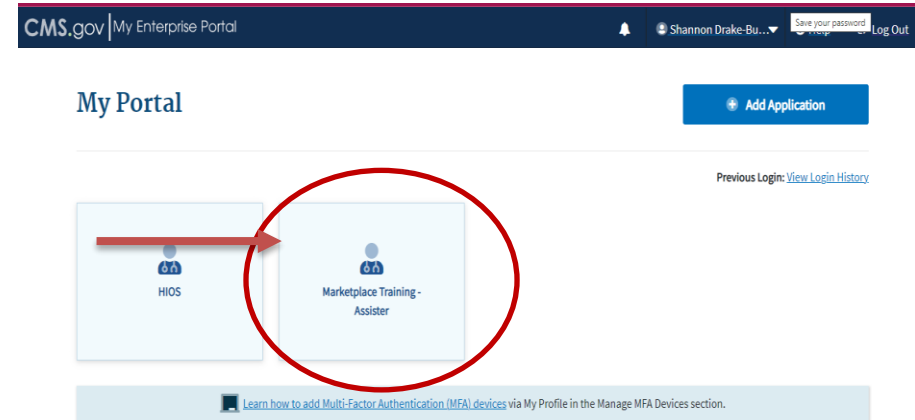
If upon logging into the CMS Enterprise Portal all you see is the loading icon, try the following:

1. Use Chrome (it is the recommended web browser)
2. Clear your web-browser cache and cookies
3. Use incognito mode





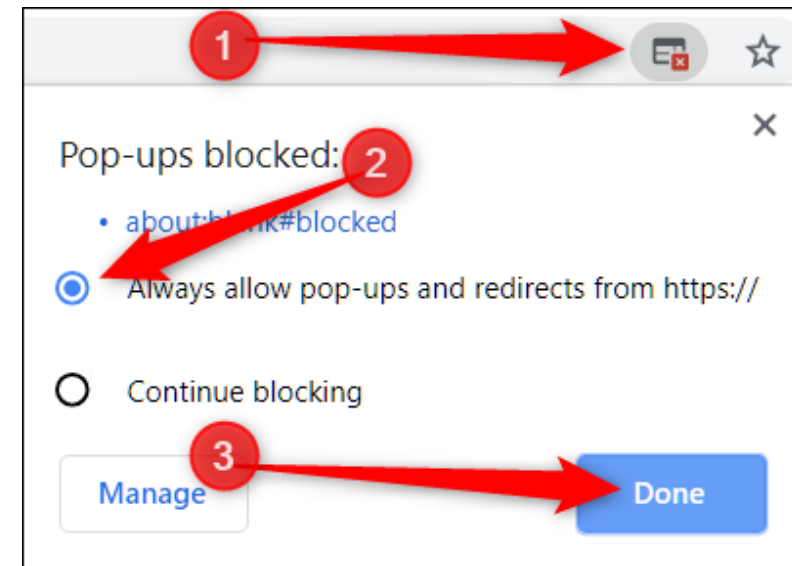
Getting to the MLMS Training

Once you get to the screen on the right, make sure pop-ups are allowed for <https://portal.cms.gov/>



Allow pop-ups and redirects from a site

1. On your computer, open Chrome .
2. Go to a page where pop-ups are blocked.
3. In the address bar, click Pop-up blocked .
4. Click the link for the pop-up you want to see.
5. To always see pop-ups for the site, select **Always allow pop-ups and redirects from [site]** > Done.



How to Enable Pop-Ups on Chrome

1. Open the Chrome menu at the top right by clicking on the three dots in the upper righthand corner.
2. Select Settings.
3. Select Privacy and Security in the left side menu.
4. Select Site Settings.
5. Select Pop-ups and redirects.
6. Select Add next to Allowed to send pop-ups and use redirects.
7. Input the specific page URL and select Add and enter: cms.gov. This will allow pop-ups throughout the site.

Getting to the MLMS Training

Go to *Training Options*.

If it is not opening,
make certain pop-
ups are enabled.

The screenshot shows the Health Insurance Marketplace interface. At the top, there is a blue header with the logo and the text "Health Insurance Marketplace". Below the header, a yellow banner contains a notice: "On Friday, September 9, 2022 from 4:00 PM MIT to 5:30 PM MIT, your portal will be briefly unavailable due to a software update." The main content area is divided into several sections. The "Training Options" section is highlighted with a red oval and a red arrow pointing to it from the text on the left. This section contains a blue header with a warning icon and the text "Training Options", and a white box below it with the text "PY2023 New FFM Navigator". Below this is the "Training Instructions" section, which contains several paragraphs of text and a button labeled "Ask MILA for Help". To the right of the "Training Options" section is the "Announcements" section, which has a blue header and contains a welcome message and a tip. At the bottom right is the "Your Transcript (In Progress Training)" section, which has a blue header and contains the text "No assigned training".

Health Insurance Marketplace

On Friday, September 9, 2022 from 4:00 PM MIT to 5:30 PM MIT, your portal will be briefly unavailable due to a software update.

Training Options

PY2023 New FFM Navigator

Training Instructions

Training Options: The box above lists the training options available to you as an assister

In Progress Training: The box to the right lists your current training that you are in the process of completing. [Your detailed transcript page is here: Your Transcript \(In-Progress Training\)](#)

Certificates: After successfully completing the required Assister Curriculum Training and examinations, you can access your certificate from the Completed Transcript page. Click the hyperlink **Completed Transcript** and select **Completed** from your status drop-down: **Completed Transcript**

If assistance is required during your training, please check out The MLMS Interactive Learning Assistant (MILA). MILA is our Artificial-Intelligence driven chatbot available to assist you with your MLMS questions 24 hours a day, 7 days a week. Click the button **Ask MILA for Help**

Visit the [Assister Training Resources](#) page

Announcements

Welcome to Federally-facilitated Assister Marketplace LMS

Please reference below for Marketplace certification training information, guidance, resources, questions and technical assistance.

TIP: As you complete each course and successfully pass the exam, save a screen shot with proof of course completion (exam score or end screen) for each module. While we do not anticipate any issues, in the rare event the system does not recognize course completion, screen shots can speed resolution. If, after completing all modules, you have issues with receiving credit for completion of a module(s), send the screen shots to the MLMS team at MLMSHelpDesk@cms.hhs.gov as proof of completion. In addition, please provide your user name in the email so the MLMS team can more easily resolve the issue.

Your Transcript (In Progress Training)

No assigned training

Getting to the MLMS Training

Click the
blue *Open
Curriculum*
Button

The screenshot shows the 'Health Insurance Marketplace' header. Below it, there is a 'Show More' link and a 'PY2023 New FFM Navigator' section. The 'PY2023 New FFM Navigator' section contains a blue button labeled 'Open Curriculum', which is circled in red. A red arrow points from the 'Open Curriculum' button to the 'REQUIRED ASSISTER TRAINING' section. The 'REQUIRED ASSISTER TRAINING' section lists 8 online classes, and the 'OPTIONAL ASSISTER TRAINING' section lists 1 online class. The total number of trainings is 12.

REQUIRED ASSISTER TRAINING	
ONLINE CLASS	PY2023 Assister 001 Training Overview
ONLINE CLASS	PY2023 Assister 002 Health Coverage Basics
ONLINE CLASS	PY2023 Assister 003 Affordable Care Act Basics
ONLINE CLASS	PY2023 Assister 004 Privacy Security and Fraud Prevention Standards
ONLINE CLASS	PY2023 Assister 005 Marketplace Assister Essentials
ONLINE CLASS	PY2023 Assister 006 Serving Vulnerable and Undeserved Populations
ONLINE CLASS	PY2023 Assister 007 Cultural Competence and Language Assistance
ONLINE CLASS	PY2023 Assister 008 Working with Consumers with Disabilities

OPTIONAL ASSISTER TRAINING	
ONLINE CLASS	PY2023 Assister 009 Customer Service Standards and Community Outreach

Begin Training

- Select *Launch* to begin training. Module will open in a pop-up window.
- Pop-ups must be enabled.
- Review the instructions to complete each module and receive credit for it.

Tip: If you can't find the pop-up window, check all your open browser tabs.

The screenshot displays the 'PY2023 New FFM Navigator' interface. On the left, a 'CURRICULUM PROGRESS' section shows a 0% completion rate and a sidebar with 'REQUIRED ASSISTER TRAINING' selected. The main area features a 'Required Assister Training' summary (0% completed, 8 items) and a list of six training modules, each with a 'Launch' button.

Module Title	Status	Due Date	Action
PY2023 Assister 001 Training Overview	In Progress	No Due Date	Launch
PY2023 Assister 002 Health Coverage Basics	Registered	No Due Date	Launch
PY2023 Assister 003 Affordable Care Act Basics	Registered	No Due Date	Launch
PY2023 Assister 004 Privacy Security and Fraud Prevention Standards	Registered	No Due Date	Launch
PY2023 Assister 005 Marketplace Assister Essentials	Registered	No Due Date	Launch
PY2023 Assister 006 Serving Vulnerable and Underserved Populations	Registered	No Due Date	Launch

Starting Each Course



Before we begin, you need to be aware of these training disclaimers. Select each menu item below to read each disclaimer.

Disclaimers

Assister Training Content

Coronavirus

Remote Application Assistance

FFM Navigator Duties

The Affordable Care Act (ACA) and associated regulations refer to Health Insurance Marketplaces as American Health Benefit Exchanges, Health Insurance Exchanges, or Exchanges. Throughout this training, you'll see the term Marketplace used interchangeably with Exchange.

Completing Each Course

Conclusion
Conclusion

Text Only



Great job! In this course, you reviewed what courses make up the assister curriculum, learned important terms, clarified your roles and responsibilities as an FFM consumer assistance entity, and studied how to provide fair, accurate, and impartial information to consumers.

You have successfully completed this course!
Close this browser window to leave the course.

Take a screenshot of this screen in the event it doesn't record.

Confirm Course Completion Recorded





The screenshot displays the 'PY2023 New FFM Navigator' interface. On the left, a circular progress indicator shows 13% completion. Below it, a sidebar lists 'REQUIRED ASSISTER TRAINING' and 'OPTIONAL ASSISTER TRAINING'. The main content area, titled 'PY2023 New FFM Navigator', shows a summary for 'Required Assister Training' with 13% completion (1 of 8 items). A list of four training modules follows, each with a 'Launch' button. The first module, 'PY2023 Assister 001 Training Overview', is circled in red and has a 'Completed' status highlighted in yellow.

Home > PY2023 New FFM Navigator

PY2023 New FFM Navigator

Options ▾

Required Assister Training ⓘ
13% Completed: 1 Min Required: 8 Total Items: 8

 <input checked="" type="checkbox"/>	PY2023 Assister 001 Training Overview Status: Completed Due: No Due Date	Launch ▾
 <input type="checkbox"/>	PY2023 Assister 002 Health Coverage Basics Status: Registered Due: No Due Date	Launch ▾
 <input type="checkbox"/>	PY2023 Assister 003 Affordable Care Act Basics Status: Registered Due: No Due Date	Launch ▾
 <input type="checkbox"/>	PY2023 Assister 004 Privacy Security and Fraud Prevention Standards Status: Registered Due: No Due Date	Launch ▾

Saving Your Training Progress

Your progress should save automatically, and the system will bring you back to where you left off.

The screenshot shows the 'rketplace' portal interface. At the top, there is a blue header with the 'rketplace' logo and a yellow notification bar stating: 'EDT to 1:30 AM EDT, your portal will be briefly unavailable due to a software update.' Below the header, the main content area is titled 'PY2023 New FFM Navigator'. On the left side, there is a 'CURRICULUM PROGRESS' section with a circular progress indicator showing '13%'. Below this, there are two categories: 'REQUIRED ASSISTER TRAINING' (selected) and 'OPTIONAL ASSISTER TRAINING'. The main content area displays a list of training items under the heading 'PY2023 New FFM Navigator' with an 'Options' dropdown menu. The list includes:

- PY2023 Assister 001 Training Overview**: Status: Completed, Due: No Due Date. A 'Launch' button is visible.
- PY2023 Assister 002 Health Coverage Basics**: Status: In Progress, Due: No Due Date. A 'Launch' button is visible and circled in red, with a red arrow pointing to it.
- PY2023 Assister 003 Affordable Care Act Basics**: Status: Registered, Due: No Due Date. A 'Launch' button is visible.
- PY2023 Assister 004 Privacy Security and Fraud Prevention Standards**: Status: Registered, Due: No Due Date. A 'Launch' button is visible.

Returning to Training

<https://portal.cms.gov>

Login Login with PIV Card

CMS.gov | Enterprise Portal

User ID is a required field

Password is a required field

I agree to the [Terms & Conditions](#)

Login

Forgot your [User ID](#) or your [Password](#)?
Need to [unlock](#) your account?

New User Registration

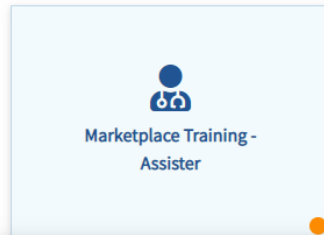
Returning to Training



My Portal

+ Add Application

Previous Login: [View Login History](#)



Marketplace Training - Assister

Marketplace Training - Assister

MLMS Training

Saving Your Training Progress

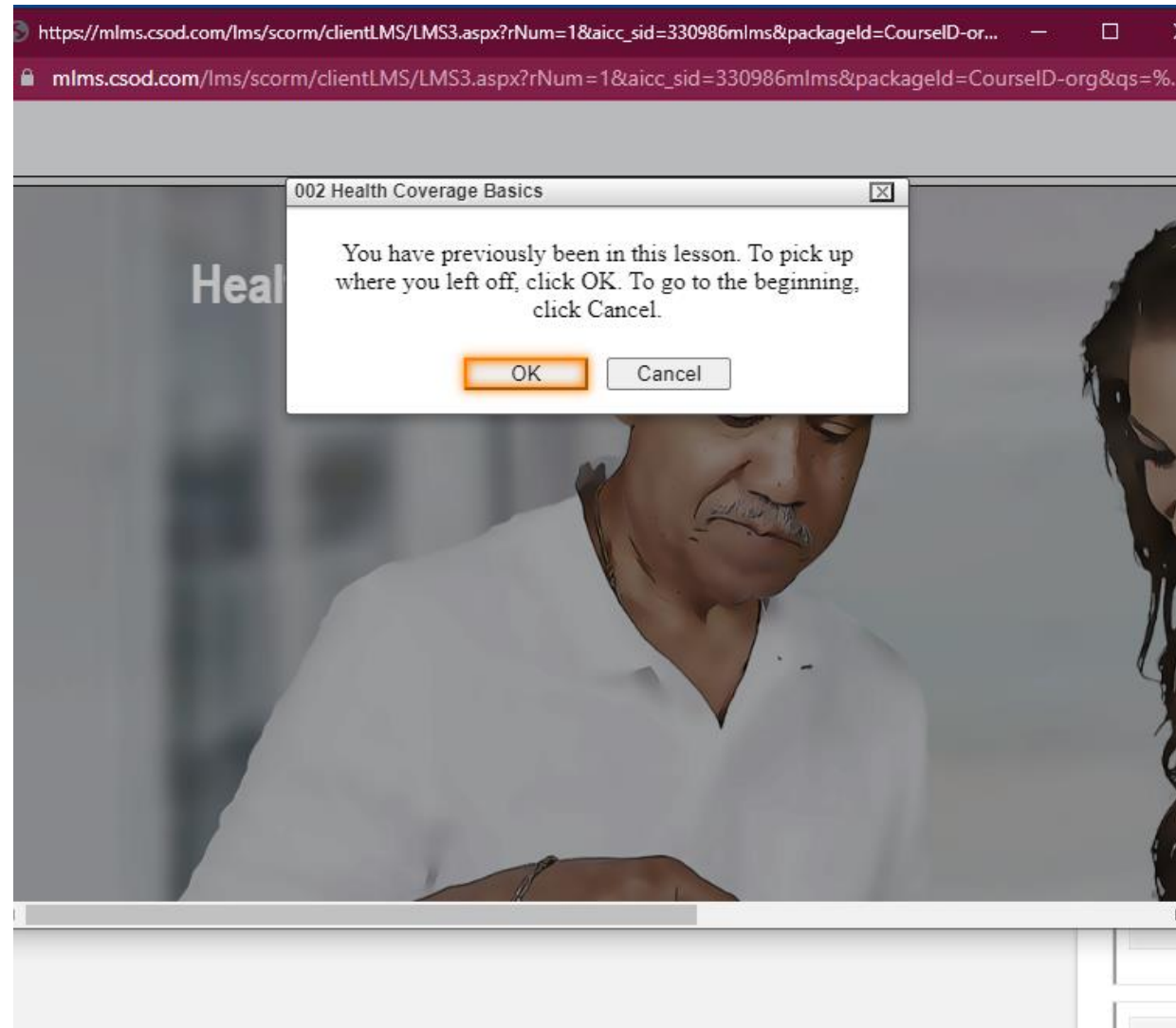
To return to a module click the blue launch button

The screenshot displays the 'rketplace' interface for the 'PY2023 New FFM Navigator'. A yellow banner at the top indicates a software update. The main content area shows a 'CURRICULUM PROGRESS' section with a 13% completion indicator. Below this, a sidebar lists 'REQUIRED ASSISTER TRAINING' and 'OPTIONAL ASSISTER TRAINING'. The main panel lists four training modules, each with a 'Launch' button. The second module, 'PY2023 Assister 002 Health Coverage Basics', is highlighted with a red oval and a red arrow pointing to its 'Launch' button. The status of this module is 'In Progress'.

Module Name	Status	Due Date	Action
PY2023 Assister 001 Training Overview	Completed	No Due Date	Launch
PY2023 Assister 002 Health Coverage Basics	In Progress	No Due Date	Launch
PY2023 Assister 003 Affordable Care Act Basics	Registered	No Due Date	Launch
PY2023 Assister 004 Privacy Security and Fraud Prevention Standards	Registered	No Due Date	Launch

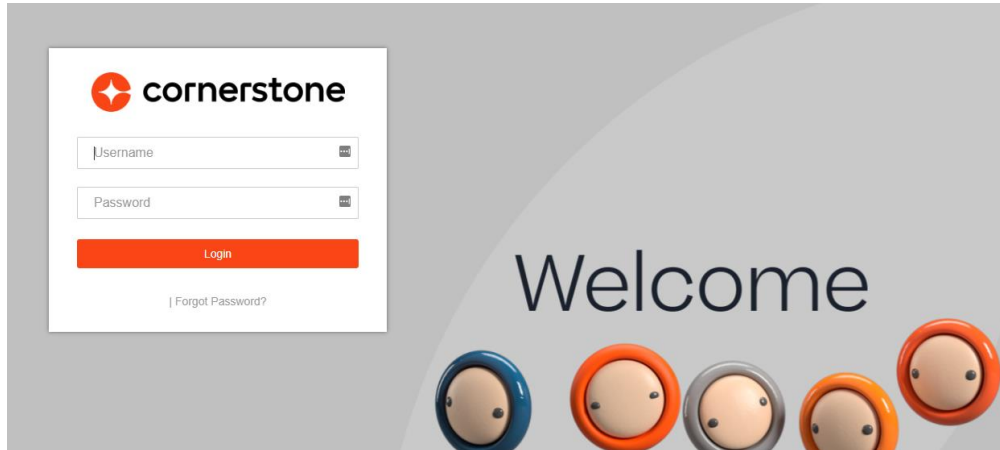
Returning to Training

To pick up where you left off. Select *OK* when you see this pop-up.

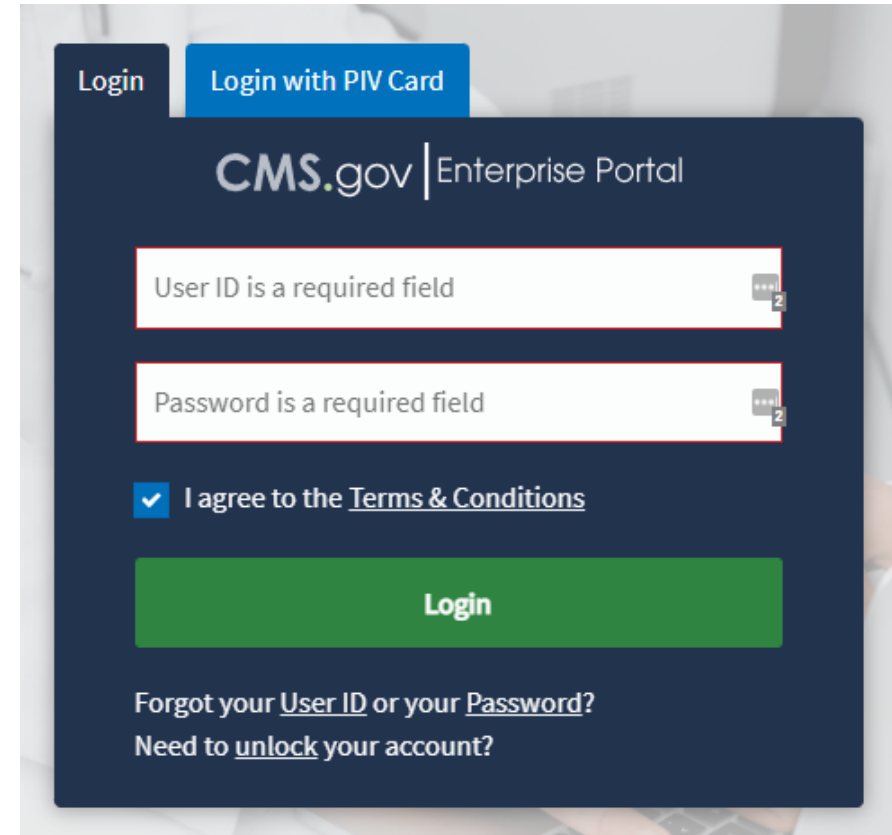


Time Out Screen

If you end up here:



Go back to: <https://portal.cms.gov>



Save Your Training Completion Certificate

Make certain to save your training completion certificate when you complete all the required training modules. You will need it to:

1. Apply for or renew your Navigator license
2. Share with your organization for your CAC or Navigator credentialing.

Health Insurance Marketplace

On Friday, September 9, 2022 from 4:00 PM MIT to 5:30 PM MIT, your portal will be briefly unavailable due to a software update.

Training Options

PY2023 New FFM Navigator

Training Instructions

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If assistance is required during your training, please check out The MLMS Interactive Learning Assistant (MILA). MILA is our Artificial-Intelligence driven chatbot available to assist you with your MLMS questions 24 hours a day, 7 days a week. Click the button **Ask MILA for Help**

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Announcements

Welcome to Federally-facilitated Assister Marketplace LMS

Please reference below for Marketplace certification training information, guidance, resources, questions and technical assistance.

TIP: As you complete each course and successfully pass the exam, save a screen shot with proof of course completion (exam score or end screen) for each module. While we do not anticipate any issues, in the rare event the system does not recognize course completion, screen shots can speed resolution. If, after completing all modules, you have issues with receiving credit for completion of a module(s), send the screen shots to the MLMS team at MLMSHelpDesk@cms.hhs.gov as proof of completion. In addition, please provide your user name in the email so the MLMS team can more easily resolve the issue.

Your Transcript (In Progress Training)

No assigned training

Health Insurance Marketplace

Training Options

PY2023 New FFE CAC L0AD 2

Training Instructions

Training Options: The box above lists the training options available to you as an assister

In Progress Training: The box below lists your current training that you are in the process of completing. [Your detailed transcript page is here.](#) In Progress Training

Certificates: After successfully completing the required Assister Curriculum Training and examinations, you can access your certificate from the Complete Transcript page. Click the hyperlink **Completed transcript and select Completed** from your status drop-down: **Completed Transcript**

If assistance is required during your training, please check out The MLMS Interactive Learning Assistant (MILA). MILA is our Artificial-Intelligence driven chatbot available to assist you with your MLMS questions 24 hours a day, 7 days a week. Click the button [Ask MILA for Help](#)

Visit the Assister Training Resources page

Contact the MLMS Help Desk

Assister Specific Help Desk Resources (Non-BLMS)

Navigators

CAC
Assister in State Based Exchange using the Federal Platform

Assister (Other)

Contact your Navigator Grant Program Officer
Contact the CAC HelpDesk
Contact your State Department of Insurance
Contact your State Department of Insurance and/or Overseeing Organization

cornerstone

1st Select Completed Transcript

Filter for Completed Curriculum

Filter by Training Status Sort by Filter by Training Type

Completed Completion Date All Types

Active

Completed

Archived

Removed

New FFE Navigator
Start Date: 8/1/2022 Status: Completed

Finally, Select View Certificate from the drop-down

View Completi...

View Completion Page

View Certificate

Open Curriculum

View Training Details

Move to Archived Transcript

You may need to select the Activate Adobe Acrobat link on your screen in order to see and print the certificate.

Help With Computer Settings

CMS has guides at <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training-to-ensure-your-computer-settings-work-with-the-training>

1. Quick Reference Guide: Plan Year 202x Computer Configuration Requirements
2. Plan Year 202x Marketplace Learning Management System (MLMS) Browser Pop-Up Guidance for Successful Completions

CMS.gov | Health Insurance Marketplace
Centers for Medicare & Medicaid Services

Get email updates

Applications, Forms, & Notices **Technical Assistance Resources** **Outreach & Education**

Health Insurance Marketplace home > Technical Assistance Resources

Training for navigators, agents, brokers, and other assisters

Coronavirus disease 2019 (COVID-19) Resources

- 2021 Special Enrollment Period in Response to the COVID-19 Emergency - June 2021 (slides)
- COVID-19 Vaccine Fact Sheet – posted April 28, 2021
- COVID-19 Vaccines: Who, What, Where, and Why – posted April 28, 2021 (slides)
- COVID-19 Fact Sheet for Assisters – posted October 28, 2020
- Tip Sheet on Health Coverage Option for Employers Helping their Employees During the COVID-19 National Emergency
- Marketplace Information for Businesses Impacted by COVID-19

2023 Federally-facilitated Marketplace (FFM) Assister Training

- CMS Enrollment Assister Bulletin 2022-01: Guidance Regarding Training, Certification, and Recertification for Navigators and Certified Application Counselors in the Federally-facilitated Exchanges – posted August 2022
- Quick Reference Guide: Plan Year 2023 Computer Configuration Requirements – posted August 26, 2022
- **Quick Reference Guide: Plan Year 2023 Marketplace Learning Management System (MLMS) Browser Pop-Up Guidance for Successful Completions – posted August 26, 2022**
- Quick Reference Guide: Plan Year 2023 FFM Registration with ID Verification for Assisters – posted August 26, 2022
- Quick Reference Guide: Plan Year 2023 Assister ID Validation – posted August 26, 2022
- Navigator and Certified Application Counselor (CAC) Training Courses – posted August 2022
- Assister Readiness Webinar Series
- Marketplace Assister Microlearning
- Complex Case Web Form Presentation for Assisters – February 5, 2021 (slides)
- Complex Case Web Form User Guide – posted June 2021
- How to View Your CMS Profile – posted June 2021 (video) (transcript)

Additional CMS Training Support Resources

2023 Federally-facilitated Marketplace (FFM) Assister Training

- [CMS Enrollment Assister Bulletin 2022-01: Guidance Regarding Training, Certification, and Recertification for Navigators and Certified Application Counselors in the Federally-facilitated Exchanges](#) – posted August 2022
- [Quick Reference Guide: Plan Year 2023 Computer Configuration Requirements](#) – posted August 26, 2022
- [Plan Year 2023 Marketplace Learning Management System \(MLMS\) Browser Pop-Up Guidance for Successful Completions](#) – posted August 26, 2022
- [Quick Reference Guide: Plan Year 2023 FFM Registration with ID Verification for Assisters](#) – posted August 26, 2022
- [Quick Reference Guide: Plan Year 2023 Assister ID Validation](#) – posted August 26, 2022
- [Navigator and Certified Application Counselor \(CAC\) Training Courses](#) – posted August 2022
- [Assister Readiness Webinar Series](#)
- [Marketplace Assister Microlearning](#)
- [Complex Case Web Form Presentation for Assisters](#) – February 5, 2021 (slides)
- [Complex Case Web Form User Guide](#) – posted June 2021
- [How to View Your CMS Profile](#) – posted June 2021 (video) (transcript)
- [How to Validate Your Assister ID on MLMS](#) – posted June 2021 (video) (transcript)
- [How to Enroll in Assister Training](#) – posted June 2021 (video) (transcript)
- [How to Complete Training and Print Your Certificate](#) – posted June 2021 (video) (transcript)
- [Remote Identity Proofing \(RIDP\) Tips for Success](#)

Warning Regarding Summer Training on MLMS Portal

2021 Assister Certification Training on the Marketplace Learning Management System

(MLMS) “Go-Dark”

As we prepare to release the 2022 Assister Certification Training, the 2021 Assister Certification Training that is hosted on the Marketplace Learning Management System (MLMS), will be taken offline at 6:00 p.m. (ET) on **Monday, August 2, 2021**. During the “go-dark” period, assisters will not be able to access the certification training. We anticipate that the 2021 Assister Certification Training will be available later this summer.

August Warning

Every August (specific dates vary) the training on the MLMS portal goes dark as CMS refreshes the training for the next Open Enrollment season.

If you’re on-boarding new assisters, please factor this into your onboarding timeline!



Marketplace Assister Microlearning

CMS now offers [Microlearning modules](#) to refresh your knowledge on common tasks that Navigators and CACs help consumers to complete.



On this site, you will find an optional selection of short and interactive microlearning modules to help you assist Health Insurance Marketplace consumers.

[Navigating the Modules](#) [Module Listing](#)

Select the topic below to get started.



Module Listing

Reporting Life Changes

1. Types of Qualifying Life Events
2. Making Changes to a Marketplace Application
3. Terminating a Marketplace Plan
4. Changing Marketplace Plans

Reporting Income

1. Household Size and Types of Income to Include on a Marketplace Application
2. Reporting Income on a Marketplace Application
3. Assisting a Household with Unpredictable Income
4. Resolving an Income Data Matching Issue

Account Creation

1. Income Calculator, Window Shopping Tool, and Savings Estimator Tool
2. Connecting an Existing Marketplace Application to an Online Account
3. Identity Verification And Screening Questions

CMS Help

Help Desk Information

MLMS Help Desk

Email: MLMSHelpDesk@cms.hhs.gov

- Can't print your certificate
- Can't find curriculum
- Training is not launching

CAC Questions Help Desk

Email: cacquestions@cms.hhs.gov

- Error message; CAC ID not valid
- Issues that cannot be resolved by the other help desks

CMS Enterprise Portal Help Desk

Email: CMS_FEPS@CMS.hhs.gov

- Phone: 855-267-1515
- User ID / Password Issues
- No access to MLMS

Navigators

For any other issues, or if you cannot get your issue resolved, please email your project officer

Manual ID Verification Help Desk

Email: FFMProducer-AssisterHelpdesk@cms.hhs.gov

- You have provided your **personal** information during the identity verification process, but the system cannot identify you
- Request a manual ID verification and provide a copy of your driver's license

Include the following information:

- Screenshot (s) of issue
- Third party security software installed (if applicable)

Wisconsin Requirements



Wisconsin Office of the
COMMISSIONER
OF INSURANCE

Certified Application Counselors

Complete 16 hour pre-licensing training. This can be accident and health or navigator specific training.

- See [list of courses offered](#)
- Obtain your pre-licensing completion certificate.
- Bring your certificate with you to your exam. The exam proctor will ask to see it before you will be allowed to take the exam.

Schedule and pass the Navigator Exam 22-14

- Schedule through PSI website at home.psiexams.com
- Exam fee is \$75

Be associated with a Certified Application Counselor Designated Organization (CDO)

- This will be a hospital, community health center, or other community-based organization which has registered for this status with the Centers for Medicare and Medicaid (CMS).

CDO Notifies the Office of the Commissioner of Insurance

- The hospital, health center, or community-based organization you're associated with will do this.

Navigators

Complete 16 hour pre-licensing training. This can be accident and health or navigator specific training.

- See [list of courses offered](#)
- Obtain your pre-licensing completion certificate.
- Bring you certificate with you to your exam. The exam proctor will ask to see it before you will be allowed to take the exam.

Schedule and pass the Navigator Exam 22-14

- Schedule through PSI website at home.psiexams.com
- Exam fee is \$75

Submit Fingerprinting & Background Check

- Go to fieldprintwisconsin.com
- Use Fieldprint code FPWIOCIINSURANCE
- Cost is approximately \$30-\$40
- You must apply for your license within 180 days of getting fingerprints taken

Submit Individual Navigator Application

- Submit application through the [National Insurance Producer Registry](#)
- New Navigator License - \$0 + \$5.60 processing fee
- Renewal: \$35 + \$5.60 processing fee

Covering Wisconsin Sub Awardee Navigators that were CACs

~~Pre-licensing & Exam~~

- You already completing pre-licensing and exam requirements. You do not need to redo these steps.

Submit Fingerprinting & Background Check

- Go to fieldprintwisconsin.com
- Use Fieldprint code FPWIOCIINSURANCE
- Cost is approximately \$30-\$40
- You must apply for your license within 180 days of getting fingerprints taken

Submit Individual Navigator Application

- Submit a [paper application](#) to OCI.
 - Complete the form and email it to ociagentlicensing@wisconsin.gov
- New Navigator License - \$0

Pre-Licensing Training Requirement

Each fall Covering Wisconsin partners with the Office of the Commissioner of Insurance (OCI) and the Wisconsin Department of Health (DHS) to offer a synchronous pre-licensing training course for new Navigators and Certified Application Counselors as part of the Enrollment Conference.

2022 Wisconsin Health Insurance Enrollment Conference



Pre-Licensing Training Requirement

Alternatively, you can get 16 hours pre-licensing credits, which can be in accident and health or Navigator-specific training, by completing coursework with any certified vendor.

Find course listing at <https://sbs.naic.org/solar-external-lookup/>.

The screenshot shows a 'Lookup Search' form with the following fields and options:

- Jurisdiction REQUIRED:** Wisconsin (highlighted with a red circle)
- Search Type REQUIRED:** Course or Provider
- Provider Name:** Enter Provider Name
- Education Type:** Pre-Licensing (highlighted with a red circle)
- Provider Number:** [Text Input]
- Course Name:** [Text Input]
- Course Number:** [Text Input]
- Course Method:** [Dropdown Menu]
- Course Group:** [Dropdown Menu]
- Offering Location Criteria:**
 - Offering Start Date:** [Calendar Icon]
 - Offering End Date:** [Calendar Icon]
 - Offering City:** [Text Input]
 - Offering State:** [Dropdown Menu]
 - Offering Zip:** [Text Input]

At the bottom, there is a checkbox for 'I agree to the NAIC's Terms and Conditions' and a copyright notice: '© 2021 National Association of Insurance Commissioners. All rights reserved.'

Pre-Licensing Training Requirement

Select **Wisconsin, Pre-Licensing** and **Navigator** to find additional Pre-Licensing training options.

Note: The Wisconsin OCI Training is generally only available as part of the conference.

The screenshot shows a web browser window with the URL `sbs.naic.org/solar-external-lookup/lookup?jurisdiction=WI&searchType=Course%20or%20Provider&educationType=PRELI&courseName=Navigator%20`. The page displays a 'Lookup Search' form on the left and a table of results on the right. Three search filters are circled in red: 'Jurisdiction' set to 'Wisconsin', 'Education Type' set to 'Pre-Licensing', and 'Course Name' set to 'Navigator'. The results table contains three entries:

Course Name ↑	Course Number	Credits	Group	Provider Name
NAVIGATOR PRELICENSING	69099	16-General	Pre-Licensing Navigator PE Training	WICK INSURANCE SERVICES
NAVIGATOR PRELICENSING TRAINING	69102	16-General	Pre-Licensing Navigator PE Training	WISCONSIN OCI
WISCONSIN NAVIGATOR PRELICENSING TRAINING	69103	16-General	Pre-Licensing Navigator PE Training	AD BANKER & COMPANY LLC

Exam

OCI requires **both** CACs and Navigators to take the **same** exam called the Navigator Exam 22-14.



[This Photo](#) by Unknown Author is licensed under [CC BY-SA](#)

Exam Concepts

Affordable Care Act

Basic Health Insurance
Concepts

Health Insurance
Exchanges under the ACA

Navigators and Non-
navigator Assistants (CACs)

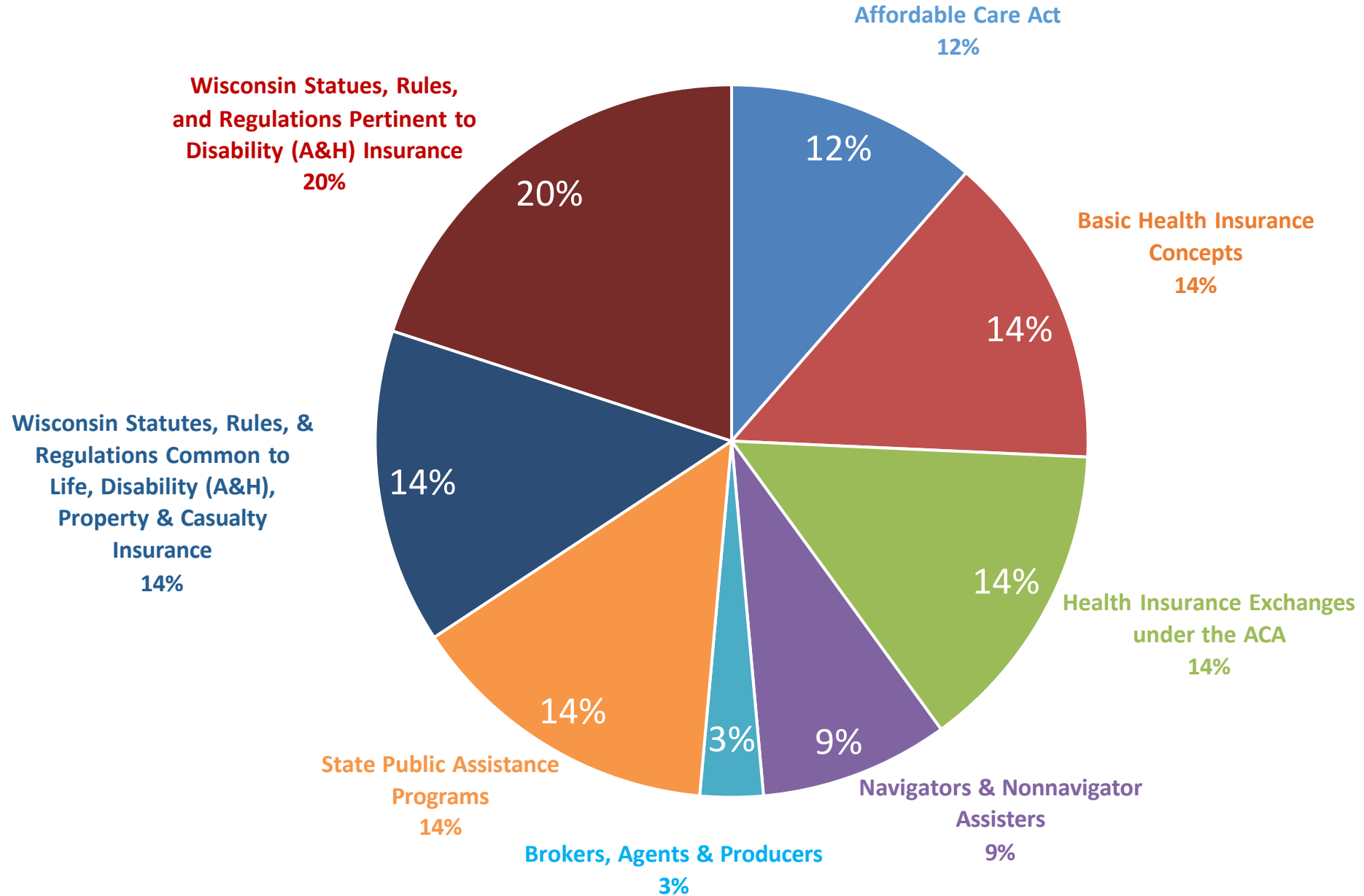
Brokers, Agents and
Producers

State Public Assistance
Programs

Wisconsin Statutes,
Rules, and Regulations
Common to Life,
Disability (A&H), Property
and Casualty Insurance

Wisconsin Statutes, Rules,
and Regulations Pertinent
to Disability (A&H)
Insurance

EXAM QUESTION DISTRIBUTION



Exam Overview

- 35 multiple choice questions
- One hour time limit
- Taken on a computer either at a testing site or remote
- Available in English, Spanish or Hmong
- Special accommodations are available. You may submit a request [here: https://psi-cdexp.zendesk.com/hc/en-us/requests/new?ticket_form_id=360000150872](https://psi-cdexp.zendesk.com/hc/en-us/requests/new?ticket_form_id=360000150872).

Exam Study Materials

Go to: <https://coveringwi.org/newcacnav>

Getting Licensed & Registered

Becoming a CAC or Navigator

Wisconsin Requirements

1. Complete 16 credit hours of pre-licensing training and receive a certificate verifying completion.
2. Take and pass the Navigator Exam 22-14.
3. Complete registration process with the Office of Commissioner of Insurance.

Federal/CI

1. Comp process
2. Comp Navig MLMS

Exam Concepts

- Affordable Care Act
- Basic Health Insurance Concepts
- Brokers, Agents and Producers
- State Public Assistance Programs

PSI Exam

Need to schedule your Navigator Exam with

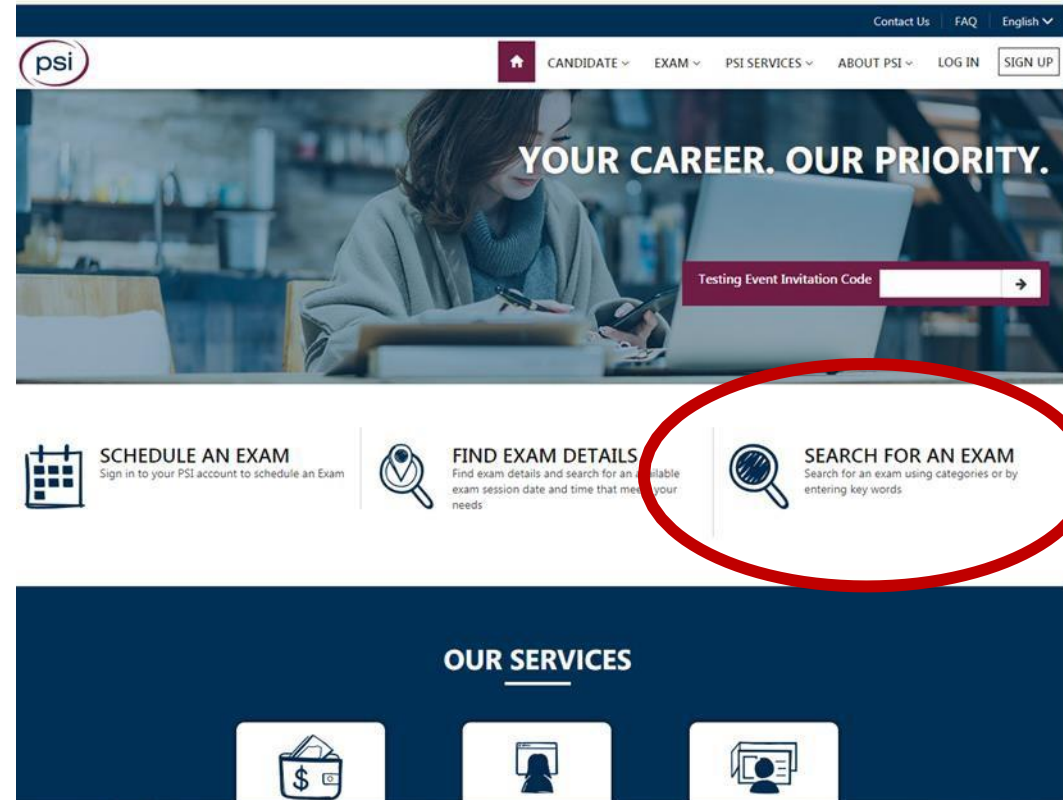
[Exam Appointment](#)

A PDF that walks you through both CMS/Federal requirements and OCI/State requirements in order to become a CAC or Navigator.

1. [An Intermediary's Guide to Wisconsin Insurance Law](#)
 - Chapters 1-4
2. Navigator Exam Outline
3. [CWI Study Guide Slide Deck](#) – Breaks down key concepts from the Intermediary Guide to Health Insurance Law
4. [Mandated Benefits in Health Insurance Policies](#) – review mandated benefits by Wisconsin law.
5. [Navigator Exam Explanation](#) - 31 minutes long and contains exam taking strategy and key concepts.

Registering for the Exam

1. Go to <https://home.psiexam.com/#/home>.
2. Choose *Search for an Exam*.



Scheduling Your Exam

Search Exam: Skip

Select Organization: WI Insurance

Select Test: WI Navigator Series 22-14

psi

CONTACT US | FAQ | ENGLISH

HOME | CANDIDATE | EXAM | PSI SERVICES | ABOUT PSI | LOG IN | SIGN UP

SEARCH EXAM | ELIGIBILITY RECORD | PAYMENT | SCHEDULE EXAM

Search Exam

Type Exam/Certification/Sponsor Number

OR

Select Organization

WI Insurance

Select Test

WI Navigator Series 22-14

WI Navigator Series 22-14

Country / Location: USA | Currency: USD

	Fee	Retake Fee
<input checked="" type="checkbox"/> WI Navigator Series 22-14 (60 minutes)		
WI Navigator Series 22-14	USD 75.00	USD 75.00
Total Payable Amount	USD 75.00	USD 75.00

Click Here if you have a Testing Event Invitation Code.

Notes

For the major lines of authority you must present a certificate of completion of the required prelicensing education (classroom or self-study) to the test center in order to test. Failure to do so will cause you to be turned away and your fee will be forfeited.

Attention: State specific series tests are ONLY for individuals who were previously licensed with that line of authority. Individuals never licensed before should NOT select this test. If you are not sure, please contact the state for guidance before scheduling your test.

Prepare With Practice Tests.

Exam Information

Click Here for the Life General and State Outline 22-01

Click Here for the Life State Specific Outline 22-02


Click Here for the Accident and Health General and State Outline 22-03

Click Here for the Accident and Health State Specific Outline 22-04

Click Here for the Property General and State Outline 22-05

Scheduling Your Exam

1. Watch for a confirmation email in your inbox.
2. Use the link in the email to schedule your exam.



psi PSI Exams Online

Welcome to PSI Exams.com

The easy, paperless, and interactive approach to enhance your examination experience.

Hi Shannon Drake-Buhr,

You have successfully registered for the WI Navigator Series 22-14 Examination.

Your Confirmation Number is: S84501657.

License: WI Navigator Series 22-14
Licensing Authority: Wisconsin Insurance

You have registered for the following portions: WI Navigator Series 22-14.

Please schedule your exam at <http://www.psiexams.com> or by calling 1-800-733-9267.

Regards,
PSI Customer Service

Get prepared for your exam

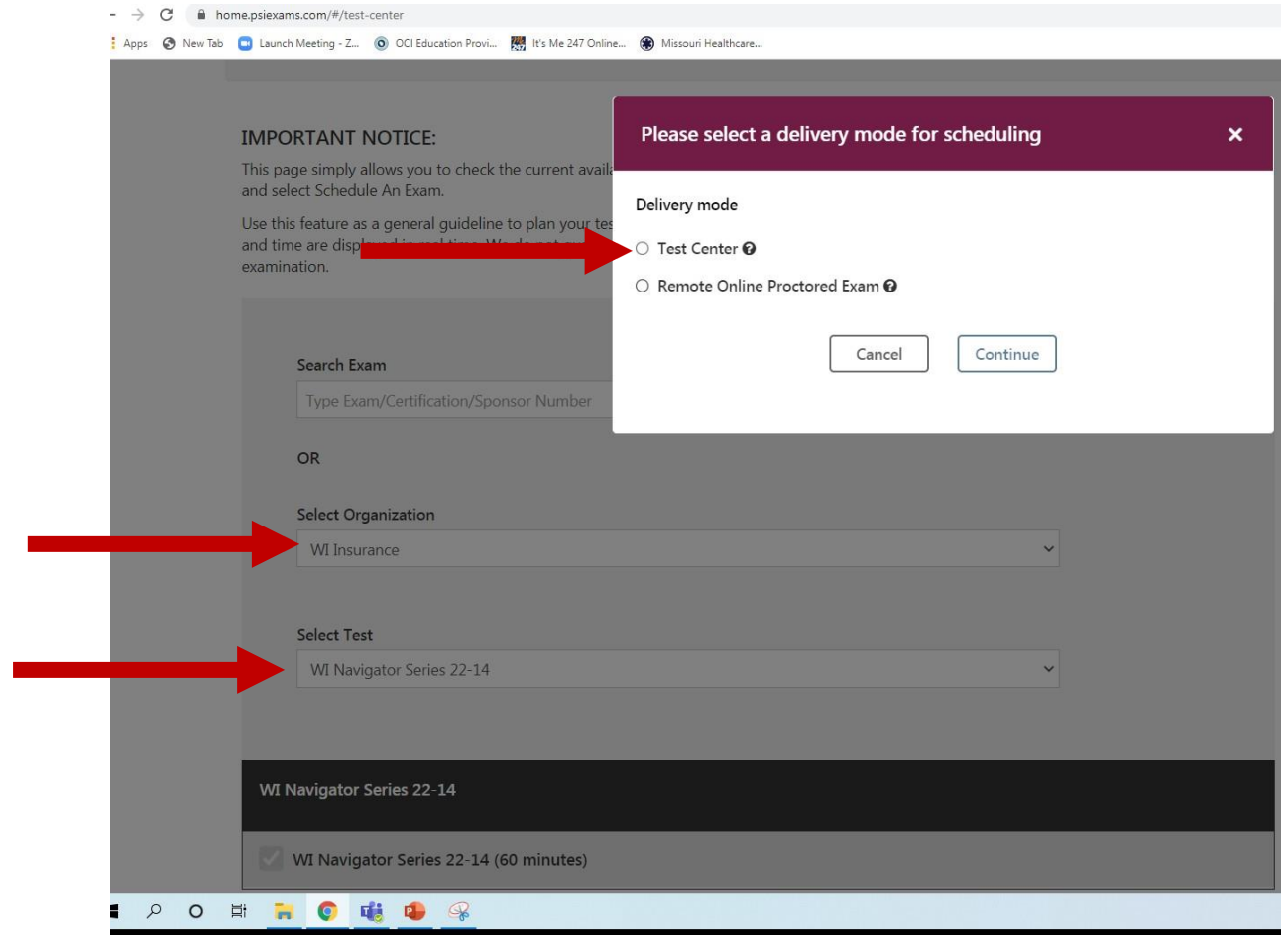
Online Practice Tests
Practice tests offering detailed feedback, instant online scoring and prescriptive score reports are available for many exams. [Check availability.](#)

PSI
2950 N Hollywood Way
Suite 200
Burbank, California 91505

Remote Exam Difficulties

If there is an in-person exam option near you, we recommend taking the exam in-person.

While taking a remote online proctored exam may sound appealing, the process is difficult.



Scheduling Your Exam

1. Once you schedule your exam you will receive a confirmation email from PSI.
2. Read all of the email.
3. Review the embedded *Candidate Information Bulletin*.

You must have the following **Mandatory Form of Identification** to present to the remote proctor prior to **exam** launch. All information must be returned away from the **test** and will forfeit your **exam** fees.

Identification:

1. All Candidates MUST present ONE form of identification. All identification presented must be current or unexpired and contain a photo and signature.
2. Acceptable forms of identification include: Driver's License, State identity card (non-driver license), Passport, Passport card, Military ID, (U.S. Coast Guard Merchant Mariner Credential).
3. You will be required to present your pre-licensing certificate in order to **test**. Acceptable forms of proof include faxed copies, electronic certificates cannot be accepted. Pre-licensing certificates are valid for 1 year from issue date.

Remote Testing IMPORTANT:

You need to perform a System Compatibility Check and ensure that all your computer system items are satisfactory before the day of testing. <https://syscheck.bridge.psiexams.com>. If you do not pass the System Compatibility Check, you cannot **test** remotely and must reschedule at a **P**SI location.

Day of **Exam** Expectations

- On the day of your **exam**, please arrive up to 30 minutes early.
- Review the Candidate Agreement here: www.oci.wi.gov
- Review the Policies and Procedures here: [Candidate Information Bulletin](#)
- You will need to log into <https://home.psiexams.com/#/home> to initiate the **exam** launch process.
- You will be prompted to download the secure browser.
- You will be required to perform a System Compatibility Check and must ensure that all of your computer system items are satisfactory before the day of testing.
- You will be required to provide one current, valid, Government issued ID with a photo.
- Please ensure your testing environment is clear, quiet, and free from distractions.
- A Web camera and microphone are required for testing.

Exam Cancellation and Rescheduling Policy:

- **Exams** must be canceled or rescheduled No later than 48 hours prior to the scheduled appointment time. If you choose not to reschedule within 48 hours, you will forfeit your **exam** fees.
- Failure to cancel or reschedule within at least 48 hours prior to the scheduled **exam** will result in forfeiting **exam** fees.
- By not starting your **exam** within 15 minutes after your scheduled appointment time, you automatically forfeit your examination scheduling fee.

Candidates should review the [Candidate Information Bulletin](#) for further information and **exam** day rules.

Sincerely,
PSI Customer Service

examschedule@psionline.com

1-888-818-5805



Candidate Information Bulletin

This bulletin contain vital information to prepare you for the administrative hurdles of the exam. Please read it.



Candidate Information Bulletin

Revised:
February 4, 2021

Find the most updated information at



Before paying for your examination registration, be sure you understand the contents of this bulletin. Please retain and use it as a reference when contacting PSI.

Exam Day – Remote Online

If you are taking your exam via remote online, note the following:

- You must take your exam in a private room, free from distractions. Your desk must be completely free of stuff.
- You must complete a [System Compatibility Check](#).
- You can launch the exam only within 30 minutes of your appointment time.
- Your location must support Voice over Internet Protocol (VoIP) in order to complete the exam.
- **Corporate firewalls and VPNs** may restrict user access. It is recommended that you use a personal device.
- Chromebooks do not work for the remote exam.
- **Issues with camera resolution are very difficult to overcome**. If your government ID or pre-licensing training certificate appears blurry when held up to your camera you **will not** be able to take the exam remotely. This is not part of the system compatibility check. Test this on your own.

Exam Day – Remote Online Help

- PSI Wisconsin Team - (888) 818-5805
- Remote Proctoring Technical Support - (844) 267-1017
- There is a live chat support link here:
<https://helpdesk.psionline.com/hc/en-gb/articles/360056570892-Live-Chat-Support>

Exam Day - Remote Online or In person

1. It is normal to take the exam more than once before passing.
2. You must complete 16 pre-licensing credit hours before taking the exam.
3. You must bring your signed and dated pre-licensing training certificate to the exam and show it to the proctor.
 - Pre-licensing training must have been completed within one year of taking the exam.
4. You must bring a government ID and show it the proctor.
 - Your ID must not be expired. The first and last name that appears on your pre-licensing training certificate should match the name on your government ID.

Information for Organizations

- Individual CACs and Navigators may not need the information that follows about Certified Application Counselor Designated Organizations (CDO) and Navigator Entities.
- It is provided for additional clarity only. If it is helpful to you or others in your organization, please use it. Otherwise please ignore it.

Certified Application Counselor Designated Organizations (CDO)

Definition: In the Federally-facilitated Marketplaces (FFMs), CDOs oversee certified application counselors (CACs) who are trained and able to help consumers seeking health insurance coverage options through an FFM. Organizations that wish to become CDOs designated by the Centers for Medicare & Medicaid Services (CMS) to serve in an FFM must submit an online application and enter into an agreement with CMS. In Wisconsin they must also register with the Office of Commissioner of Insurance. They are a vital component of the assister community.

Complete
Federal
Requirements



Follow
Wisconsin OCI
Processes



Certified
Application
Counselor
Designated
Organization
(CDO)

Federal Requirements for CDOs – Overview

- 1. Application:** Each organization interested in employing (either as paid employees or un-paid volunteers) Certified Application Counselors must first apply to become a “CAC Designated Organization (CDO).”
- 2. Contract execution:** Each organization that has applied to become a CDO will receive a contract via email which must be executed and returned.
- 3. Assign CAC numbers:** Each CDO must assign their staff and volunteers intending to act as CACs with a CAC Number.
- 4. CAC Agreement:** Each CAC must enter into an agreement with their CDO. You can find a model agreement [here](#). This agreement is reviewed every two years.
- 5. CAC Certificate:** CDOs must issue each CAC a CAC Certificate once they have completed their requirements. You can find a model certificate [here](#). This certificates should be reviewed each year in correspondence with CAC completion of the annual CMS training for the next Open Enrollment season.

Federal Requirements – New CDOs

- New CDOs – Each organization interested in employing (either as paid employees or un-paid volunteers) Certified Application Counselors must first apply to become a “CAC Designated Organization (CDO)” through CMS.
 - Read the information and complete the application found here:
<https://marketplace.cms.gov/technical-assistance-resources/assister-programs/cac-apply.html>.
 - The individual named as the authorized representative on the application should hear back on the application within a few weeks. The follow up email will include a contract that must be signed and returned to complete the process.
 - Organizations who wish to become new CDOs will have an opportunity apply between July and September of each year.
 - In 2022 the CDO Application deadline has been extended to November 1, 2022.

Federal Requirements – Current CDOs

- Current CDOs – All CDOs must renew their CDO agreement with CMS every two years. CMS will email established CDO contacts when it's time to renew. The CDO certification expiration date can be found on [the CDO Summary page of the CDO Organizational Maintenance web form, or you can email CMS at CACQuestions@cms.hhs.gov.](#) Additional information for CDOs can be found [here](#).
- CAC Roster Maintenance –CDOs must maintain a roster of their active CACs using the [CDO Organization Maintenance web form](#) for their CACs to be able to access the annual certification training on the Marketplace Learning Management System (MLMS).

Experiencing Trouble with the CMS CDO Renewal Process?

➤ Federally Qualified Health Centers

Julia Garvey

Outreach and Enrollment Coordinator

Partnership Community Health Center

920-882-6420

julia.garvey@thedacare.org

➤ Hospitals and Community Based Organizations

CMS CAC Inbox

cacquestions@cms.hhs.gov

Wisconsin Requirements

Initial Requirements

- Once authorized by the federal exchange to provide CAC assistance, the CAC entity (aka CDO) must register with OCI [by using the Non-navigator Business Entity Initial Registration form.](#)
- Provide a list of all individual CACs and any other non-navigator assisters it employs, supervises, or is affiliated with.
- Completed application and list of CACs should be e-mailed to ocialdocuments@wisconsin.gov.
- Provide monthly updates, if any, to the list of individual CACs and any other non-navigator assisters it employs, supervises, or is affiliated with.

Annual Reporting Requirements

By October 1 of each year, non-navigator assister entities must attest to OCI that their non-navigator assisters have completed [the required training by submitting the Non-navigator Business Entity Continuing Education Training Attestation and submitting the form](#) via e-mail to ocialdocuments@wisconsin.gov. Additionally, non-navigator assister entities must maintain documentation verifying that the non-navigator assisters working for or with the entity have completed the continuing education requirement.

This documentation shall consist of the following and is subject to audit by OCI:

- A summary record for each individual listing the course title, date of completion, course hours, mode of delivery (classroom, webinar, etc.) and location of class.
- Certificates of completion or verification of attendance for each course with a signature of the instructor or monitor verifying attendance.
- Course summary, outline or agenda describing the content of the course.

Navigator Entities

Definition: An organization that is trained and able to help consumers as they look for health coverage options through the Marketplace, including completing eligibility and enrollment forms. These individuals and organizations are required to be unbiased. Their services are free to consumers. In Wisconsin they must also register with the Office of Commissioner of Insurance.

Work with
Covering
Wisconsin
(Federal
Navigator Grant
Recipient)



Follow
Wisconsin OCI
Processes



Navigator
Entity

Navigator Entity Wisconsin Roadmap



Navigator Entity Wisconsin Requirements

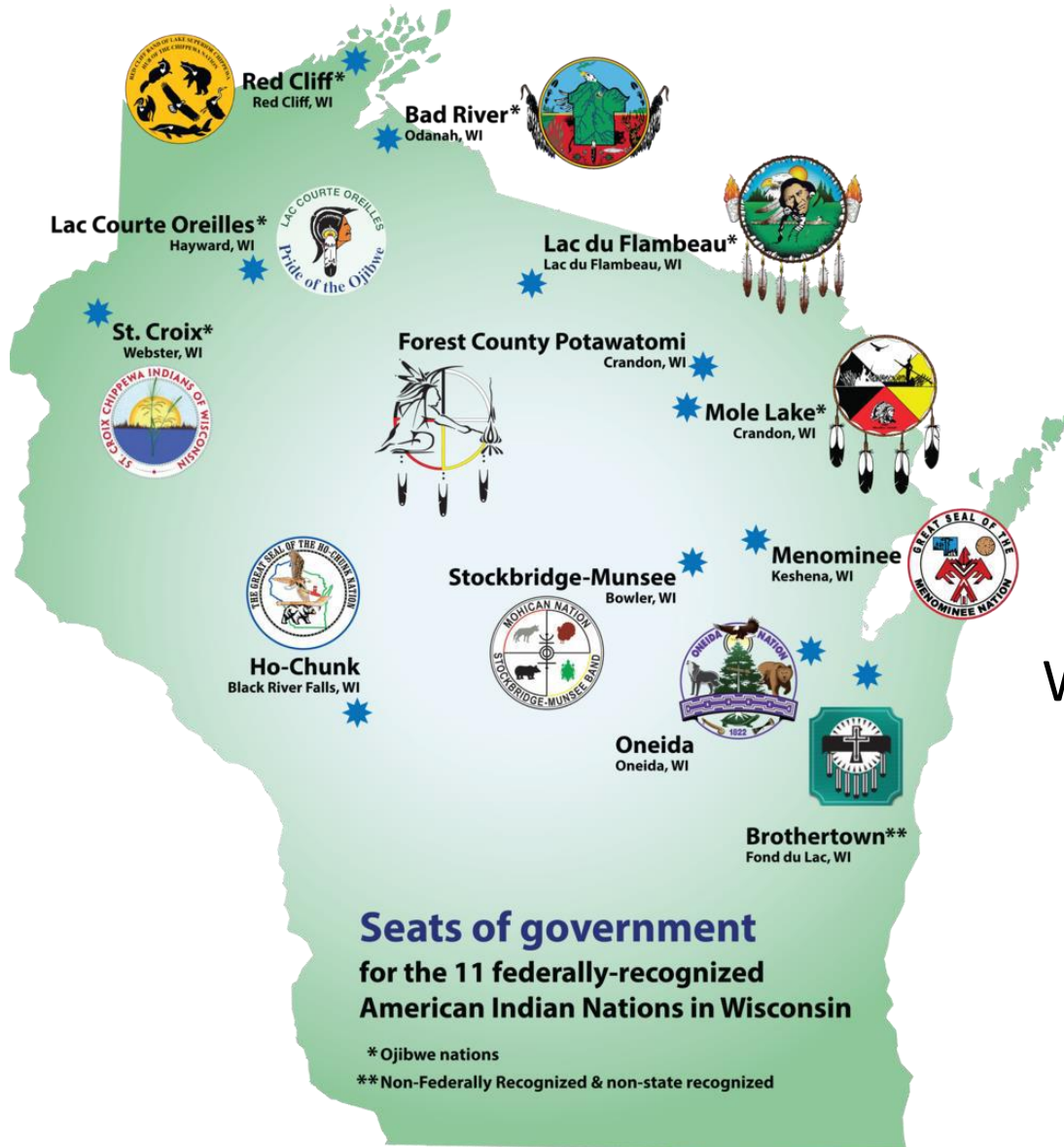
Initial Application Requirements

To register as a navigator business entity, the entity must:

1. Identify a designated responsible licensed Navigator.
2. Apply for a New License [National Insurance Producer Registry](#)
3. Submit evidence of financial responsibility.
 - \$100,000 bond; OR
 - Evidence of sufficient employee liability coverage
4. Email [OCI](#) a list of all individual navigators that it employs, supervises, or is affiliated.
5. Pay application fee of \$100 (plus \$5.60 processing fee)

Renewal Requirements

1. Renew and Existing License via the [National Insurance Producer Registry](#)
2. Submit evidence of financial responsibility.
 - \$100,000 bond; OR
 - Evidence of sufficient employee liability coverage
3. [Email OCI](#) a list of all individual navigators that it employs, supervises, or is affiliated.
4. Pay application fee of \$100 (plus \$5.60 processing fee)
4. Navigator entities must [email OCI](#) with monthly updates, if any, to the list of individual navigators it employs, supervises, or is affiliated with.



Tribal Nations

Information Specific to Tribal Nations in Wisconsin Regarding Pre-Licensing and Federal Training Requirements

CMS/Federal Requirements Sometimes Apply to Assisters Located at Tribal Nations

- If an enrollment assister is located at a tribal nation and working under their jurisdiction and they use **the title of CAC or Navigator they must complete the annual CMS Marketplace training modules.**
- If an enrollment assister, located at a tribal nation and working under their jurisdiction, **will assist individuals with health insurance enrollment but will not use the title CAC or Navigator they are not required to complete the CMS Marketplace training modules**
 - They can review the CMS Navigator and Certified Application Counselor Training Courses by [downloading and reading the publicly available slide decks.](#)
 - They can watch [HealthCare Reform Beyond the Basics](#) Open Enrollment Webinar Series to prepare to assist individuals with Marketplace Enrollment.
 - They can engage with the Self-Governance Communication and Education Tribal Consortium's [Health Reform Trainings and Webinars](#). This group holds learning events that explore the aspects of Marketplace enrollment that are specific to HIS, IHCP, THO and members of tribes.

Wisconsin Licensing Requirements Do Not Apply to Assistants Located at Tribal Nations

- CACs located at tribal nations and working under their jurisdiction do not have to complete pre-licensing training or pass the Navigator Exam.
- Wisconsin OCI recognizes tribal sovereignty over foreign persons, activities, and land within each tribal nation.
- OCI will handle complaints regarding the activities of a CAC acting on behalf of a tribal CAC entity on a case-by-case basis. OCI intends to only regulate CAC and CAC entity activity that occurs outside of tribal sovereign jurisdictions.
- Covering Wisconsin recommends these assistants complete pre-licensing coursework, especially sessions that focused on Wisconsin Medicaid programs.

How to Stay Updated on Policy Changes

Wisconsin Department of Health Services

- Sign-Up for ForwardHealth Community Partners Email - <https://www.dhs.wisconsin.gov/forwardhealth/partners.htm>
- Tune into bi-monthly Wisconsin Programs Eligibility Policy Updates Call Series <https://www.dhs.wisconsin.gov/dms/policycalls.htm>

Centers for Medicare and Medicaid

- Join the CMS Navigator and CAC listserv. Email ASSISTERLISTSERV@cms.hhs.gov
- Sign-up for the Marketplace Assister Webinar Series on RegTap <https://regtap.cms.gov/>

REGTAP

After logging in go to Training Events and look for the Marketplace Assister Webinar Series

Click the magnifying glass

The screenshot shows the REGTAP website interface. The navigation bar includes links for My Dashboard, Training Events (circled in red), Inquiry Tracking, Library, FAQs, About REGTAP, Contact Us, and a Log Out button. The main content area is titled 'Training Events' and features a table of upcoming events. The 'Marketplace Assister Webinar Series' is highlighted with a red oval. A 'Registration Tips' button is located in the top right corner of the table area.

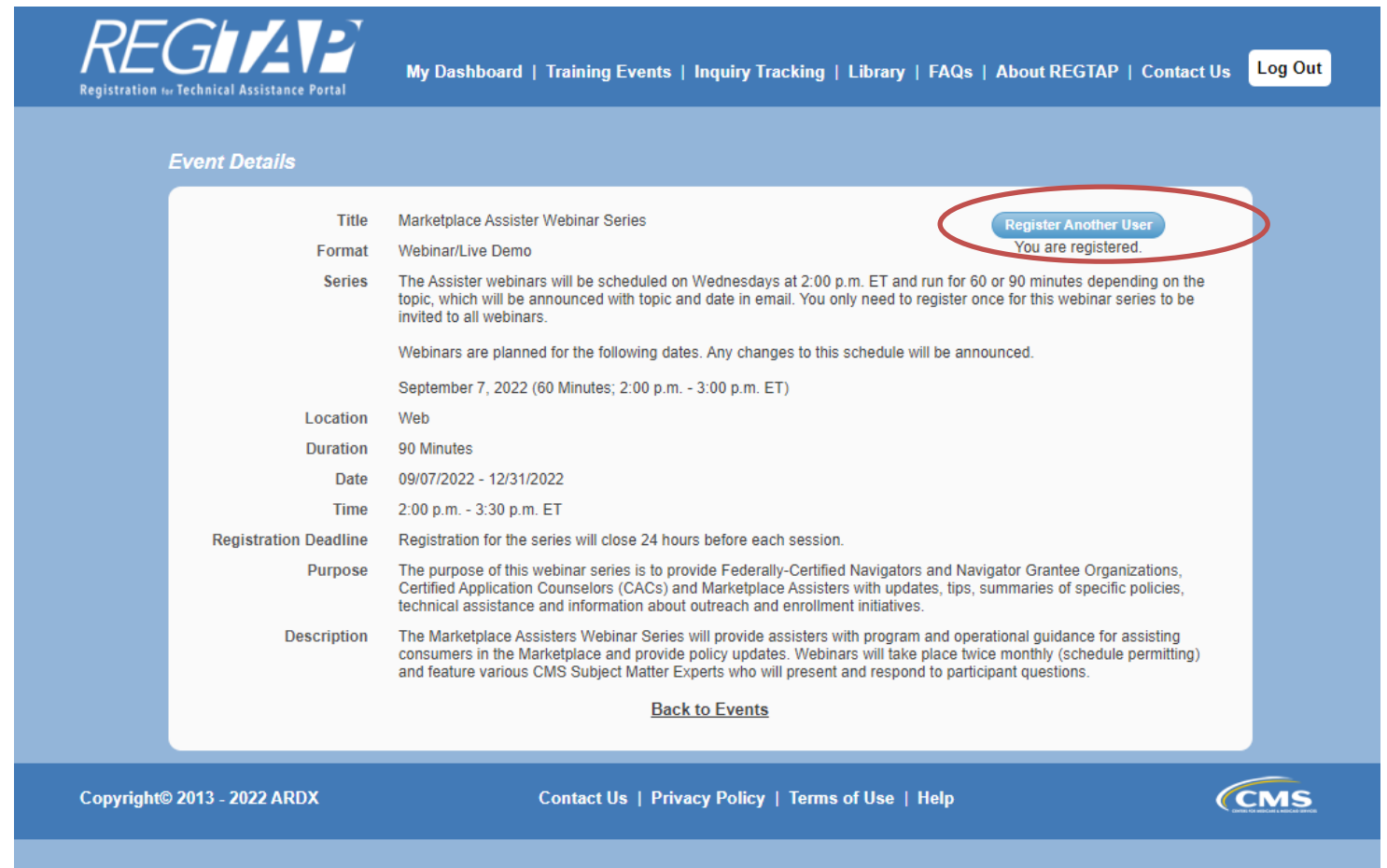
View	Title	Date	Format	Location	Time	Duration
	Helping Consumers More Effectively for Plan Year 2023	09/29/2022	Webinar/Live Demo	Web	2:00 p.m. - 3:30 p.m. ET	90 Minutes
	Marketplace Assister Webinar Series	09/07/2022 - 12/31/2022	Webinar/Live Demo	Web	2:00 p.m. - 3:30 p.m. ET	90 Minutes
	Benefit Year (BY) 2022 EDGE Server Webinar Series	08/23/2022 - 12/27/2022	Webinar/Live Demo	Web	12:00 p.m. - 1:00 p.m. ET	60 Minutes
	2022 Marketplace Agent and Broker Office Hours	03/03/2022 - 01/05/2023	Webinar/Live Demo	Web	2:00 p.m. - 3:00 p.m. ET	60 Minutes
	HHS Risk Adjustment Data Validation Webinar Series	01/26/2022 - 12/31/2022	Webinar/Live Demo	Web	2:00 p.m. - 3:00 p.m. ET	60 Minutes
	2022 Qualified Health Plan (QHP) Certification Webinar Series	01/13/2022 - 12/15/2022	Webinar/Live Demo	Web	Thursdays from 1:00 p.m. - 2:00 p.m. ET	60 Minutes
	Enrollment Issuer Policy Call Series XVII	01/10/2022 - 12/12/2022	Webinar/Live Demo	Web	1:00 p.m. - 2:00 p.m. ET	60 Minutes

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REGTAP

Register for the Marketplace Assister Webinar Series by clicking the blue registration button.

Once registered you will receive emails from REGTAP notifying you of upcoming webinars in that series.




REGTAP
Registration & Technical Assistance Portal

[My Dashboard](#) | [Training Events](#) | [Inquiry Tracking](#) | [Library](#) | [FAQs](#) | [About REGTAP](#) | [Contact Us](#) [Log Out](#)

Event Details

Title	Marketplace Assister Webinar Series
Format	Webinar/Live Demo
Series	The Assister webinars will be scheduled on Wednesdays at 2:00 p.m. ET and run for 60 or 90 minutes depending on the topic, which will be announced with topic and date in email. You only need to register once for this webinar series to be invited to all webinars. Webinars are planned for the following dates. Any changes to this schedule will be announced. September 7, 2022 (60 Minutes; 2:00 p.m. - 3:00 p.m. ET)
Location	Web
Duration	90 Minutes
Date	09/07/2022 - 12/31/2022
Time	2:00 p.m. - 3:30 p.m. ET
Registration Deadline	Registration for the series will close 24 hours before each session.
Purpose	The purpose of this webinar series is to provide Federally-Certified Navigators and Navigator Grantee Organizations, Certified Application Counselors (CACs) and Marketplace Assisters with updates, tips, summaries of specific policies, technical assistance and information about outreach and enrollment initiatives.
Description	The Marketplace Assisters Webinar Series will provide assisters with program and operational guidance for assisting consumers in the Marketplace and provide policy updates. Webinars will take place twice monthly (schedule permitting) and feature various CMS Subject Matter Experts who will present and respond to participant questions.

[Back to Events](#)

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How to Stay Updated on Policy Changes

Covering Wisconsin

- Sign-Up for Covering Wisconsin's Navigator and CAC listserv.

<https://coveringwi.org/contact>

Wisconsin Primary Health Care Association

- If you're at an FQHC sign-up for WPHCA's newsletter distribution list.

Contact Julia Garvey at
julia.garvey@thedacare.org

Amazing Resources

Covering Wisconsin - coveringwi.org

Check out Resources

Getting Started Understanding Health Insurance Costs

1. Choose a plan with **premiums** that you can afford every month.
 A **premium** is the **monthly** payment you make to the insurance company for your health care policy.



2. Find a plan that will help you pay the **out-of-pocket costs**.
Out-of-pocket costs are NOT included in your monthly premium. This is the amount you must pay during a year for your health care in addition to your premium. This includes any **deductible**, **co-pay**, **co-insurance**, or extra costs for services.



you pay all

Kids Forward - kidsforward.org



The Health Insurance Landscape in Wisconsin

Income (% of Federal poverty level)	Pregnant Women	Children	Parents & Caretakers	Childless Adults	15 or older Family Planning Only Services	Elderly or Disabled
0-100% FPL	BadgerCare No premium		BadgerCare with premium (50-100% FPL)		Family Planning Waiver	Includes asset tests as well as income and other restrictions
100-201% FPL	BadgerCare No premium (up to 306%)	BadgerCare No premium	Marketplace with tax credit & cost-sharing subsidy (up to 250% FPL)			
201-250% FPL		BadgerCare With premium (up to 306%)	Marketplace with tax credit			
250-306% FPL	Marketplace with tax credit					
306-400% FPL	Marketplace with tax credit					
400% + FPL	Marketplace with temporary tax credit through Dec. 2022					

The insurance options and income eligibility ranges for people who DO NOT have access to qualifying employer-sponsored insurance:

Amazing Resources

Healthcare Form Beyond the Basics Marketplace Training and Resources

The screenshot shows the homepage of healthreformbeyondthebasics.org. The header includes the "Beyond the Basics" logo, a "Subscribe" button, and the "Center on Budget and Policy Priorities" logo. The main navigation bar contains "HOME", "RESOURCES", "WEBINARS", "LATEST", and "SEARCH". A sidebar on the left lists categories: "New Laws & Policies", "Determining Eligibility", "Enrolling in a Health Insurance Plan", "Post-Enrollment Issues", "Immigrant-Related Resources", "Outreach & Enrollment Resources", and "Other Issues". The main content area features a "New Laws & Policies" section with a list of topics and a "LEARN MORE ABOUT NEW LAWS AND POLICIES" link. Below this is a "WEBINAR" section with a navigation bar for the same categories as the sidebar. At the bottom, there are two columns of text: "Beyond the Basics provides training and resources on eligibility guidelines and the enrollment process for health coverage available in the marketplace, through Medicaid, and through the Children's Health Insurance Program (CHIP). It's geared towards enrollment assisters" and "Navigators and Certified Application Counselors, known as assisters, are individuals who are trained and certified to help people get and keep their health coverage. Assisters provide free, unbiased, one-on-one help with completing applications for Medicaid and other health insurance programs."

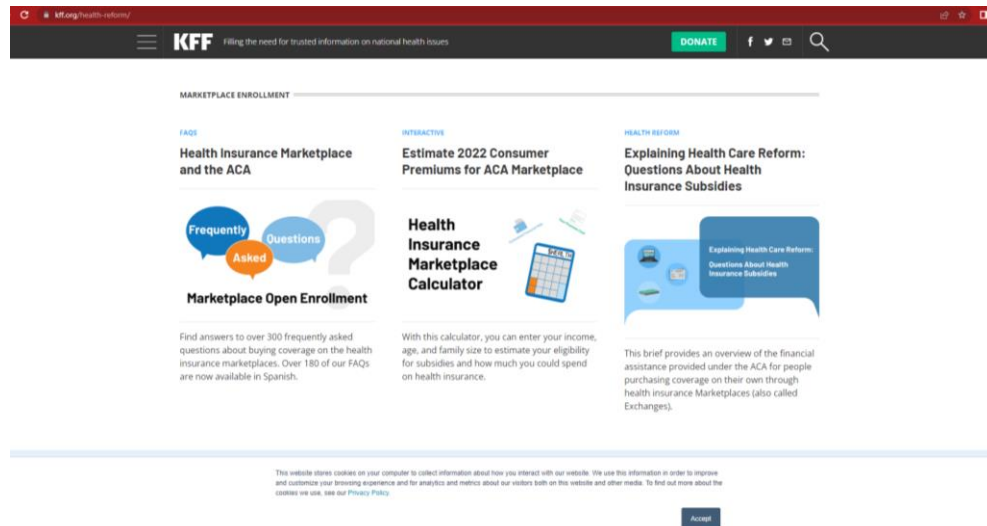
Wisconsin Collaboration on Immigrants and Public Benefits

The screenshot shows a "Public Charge Screener" interface. At the top, there is a maroon header with the text "Public Charge Screener" and a close button "X". Below the header is a large maroon box containing the text: "Hi this is Wisconsin Collaboration on Immigrants and Public Benefits. Immigrants can use most benefits without affecting their status. To learn more, reply SUPPORT Para español, responde APOYO". Below this box are two orange buttons: "SUPPORT" and "APOYO". A vertical scrollbar is visible on the right side of the interface.

Amazing Resources

KFF - Understanding Health Insurance

These resources are for anyone shopping (or helping someone shop) for health coverage within the health insurance marketplaces created through the Affordable Care Act (also known as the ACA or Obamacare).



The screenshot shows the KFF website homepage. The navigation bar includes the KFF logo, the tagline "Filling the need for trusted information on national health issues", a "DONATE" button, and social media icons. The main content area is divided into three columns under the heading "MARKETPLACE ENROLLMENT".

- MARKETPLACE ENROLLMENT**
 - FAQS**
 - Health Insurance Marketplace and the ACA**: Includes a "Frequently Asked Questions" graphic and a link to "Marketplace Open Enrollment".
 - INTERACTIVE**
 - Estimate 2022 Consumer Premiums for ACA Marketplace**: Includes a "Health Insurance Marketplace Calculator" graphic.
 - HEALTH REFORM**
 - Explaining Health Care Reform: Questions About Health Insurance Subsidies**: Includes a graphic with a speech bubble.

At the bottom of the page, there is a privacy policy notice: "This website stores cookies on your computer to enhance your navigation, analyze site usage, and assist in our marketing efforts. (See our Privacy Policy for more details.)" and a "Accept" button.

Georgetown University Center on Health Insurance Reforms – Navigator Resource Guide

This Guide is focused on the private insurance reforms of the Affordable Care Act (ACA), including the health insurance marketplaces, benefit and cost structures, and premium tax credits. It is organized into four sections that address how individuals may present themselves to Navigators based on their insurance status and coverage options



The screenshot shows the Georgetown University Center on Health Insurance Reforms website. The header includes the university logo, the center name "CENTER ON HEALTH INSURANCE REFORMS", and a search bar. The main content area features a large background image of a family and the title "Navigator Resource Guide".

- Health Coverage FAQs**: Represented by a question mark icon.
- Resources for Diverse Communities**: Represented by an icon of two people.
- State Fact Sheets**: Represented by a map of the United States icon.
- Ask An Expert**: Represented by a speech bubble icon.

At the top right, there is a navigation menu with links: "About", "Resources", "ACA Consumer Protections", "Federal Poverty Level Table", "Social Media Toolkit", and "What's New for 2022".

Have Questions?



Have questions about our programs or want to partner with Covering Wisconsin?

Contact Courtney Harris, Covering Wisconsin's Outreach & Partner Relations Manager at charris2@wisc.edu or **(608) 262-1838**, or fill out our contact form below and a staff member will get back to you as soon as possible.

Name *

First Name

Last Name

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Subject *

Message *

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(###)

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