

This document was created by the Wisconsin Primary Health Care Association as a resource for Certified Application Counselor Organizations on October 8, 2021.

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## 2022 CERTIFIED APPLICATION COUNSELOR REQUIREMENTS

### INITIAL CDO & CAC REQUIREMENTS— FEDERAL

***These activities only need to be completed once per organization, and once for each new CAC***

Federal Requirement	Instructions	Complete?
<p>1. <b>Application:</b> 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)”</p>	<p><i>Current CDOs</i> – All CDO Health Centers must renew their CDO agreement with CMS every two years. Most CDO Health Centers are due for renewal in 2020. CMS will email your 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 <a href="mailto:CACQuestions@cms.hhs.gov">CACQuestions@cms.hhs.gov</a>. Additional information for CDOs can be found <a href="#">here</a>.</p> <p>For plan year 2021 and beyond, CDOs must main 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).</p> <p><i>New CDOs</i> - Complete this application: <a href="https://marketplace.cms.gov/technical-assistance-resources/assister-programs/cac-apply.html">https://marketplace.cms.gov/technical-assistance-resources/assister-programs/cac-apply.html</a>.</p> <p>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. The deadline to submit a new application to become a new CDO for Plan Year 2022 is August 31, 2022.</p> <p>Organizations who wish to become new CDOs will have an opportunity apply between July and September of each year.</p>	
<p>2. <b>Contract execution:</b> Each organization that has applied to become a CDO will</p>	<p>Upon receipt of the confirmation email from CMS – CAC Application Review Team, an authorized individual must sign and return the attached contract to CMS.</p>	

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<p>receive a contract via email which must be executed and returned.</p>		
<p><b>3. Assign CAC numbers:</b> Each CDO must assign their staff and volunteers intending to act as CACs with a CAC Number</p>	<p>Once the organization has been approved as a CDO, the organization must assign each CAC a unique CAC number which will consist of the organizations number (8 characters) e.g. NYCACA00 and adding five characters. For additional guidance in this process see the resources below.</p> <ul style="list-style-type: none"> <li>• <a href="#">How to Assign Unique CAC IDs</a></li> </ul> <p style="color: red;">Warning! Do not recycle unique CAC ID. Each CAC should have a unique CAC ID that has a single owner. When a staff or volunteer stops serving as a CAC or leaves the organization, the number should <b>not</b> be reassigned or recycled.</p>	
<p><b>4. CMS Training:</b> Each individual CAC must complete a required CMS training and pass an exam.</p>	<p>The following materials from CMS will assist CACs to complete their federal training requirements. Please note CMS updates these materials each year in August or September.</p> <p><a href="https://marketplace.cms.gov/technical-assistance-resources/training-materials/training">https://marketplace.cms.gov/technical-assistance-resources/training-materials/training</a></p>	
<p><b>5. CAC Agreement</b></p>	<p>Each CAC must enter into an agreement with their CDO. You can find a model agreement <a href="#">here</a>.</p>	
<p><b>6. CAC Certificate</b></p>	<p>CDOs must issue each CAC a CAC Certificate once they have completed their requirements. You can find a model certificate <a href="#">here</a>.</p>	

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### INITIAL CAC REQUIREMENTS – STATE OF WISCONSIN

***These activities only need to be completed once per organization, and once for each new CAC***

State Requirement	Instructions	Complete?
<p><b>1. CAC training:</b> Each individual potential CAC must complete an initial training.</p>	<p><b>Option 1:</b> 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. <a href="https://coveringwi.org/conference">https://coveringwi.org/conference</a></p> <p><b>Option 2:</b> 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. <a href="https://sbs.naic.org/solar-external-lookup/">https://sbs.naic.org/solar-external-lookup/</a></p> <ul style="list-style-type: none"> <li>• Jurisdiction: <i>Wisconsin</i></li> <li>• Search Type: <i>Course or Provider</i></li> <li>• Education Type: <i>Pre-Licensing</i></li> </ul>	
<p><b>2. CAC examination:</b> Each individual potential CAC must pass an examination</p>	<p>To register for the exam, go to the PSI page: <a href="https://home.psiexams.com/#/home">https://home.psiexams.com/#/home</a>. Follow the steps at the bottom of the page to review the licensing information and register and schedule your exam.</p> <ul style="list-style-type: none"> <li>• Search Exam: Skip</li> <li>• Select Organization: <i>WI Insurance</i></li> <li>• Select Test: <i>WI Navigator Series 22-14</i></li> </ul> <p>Bring your pre-licensing training certificate to the exam. The exam protector will ask to see it.</p> <p>The examination for CACs is the same as the one for navigators. That is why you are being referred to the “Wisconsin Licensing Information Handbook.”</p>	

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	<p>Prepare for the exam with the following resources:</p> <ul style="list-style-type: none"> <li>• Study the <a href="#">Intermediary Guide to Wisconsin Insurance Law</a> (Chapters 1-4)</li> <li>• Watch: Applying for Wisconsin’s Health Care Programs, BadgerCare Plus Eligibility Rules and Medicaid for elderly Blind, or Disabled Eligibility Rules, Health Insurance 101, ACAC, Navigator and CAC Part I&amp;II. <a href="https://coveringwi.org/conferenceslides">https://coveringwi.org/conferenceslides</a></li> </ul>	
<p><b>3. Organizational Registration and CAC affiliation:</b> Upon authorization by the Marketplace to provide CAC assistance, and CAC completion of all training and education requirements, the organization must register with OCI and provide the office with a list of all the individual CACs and any other non-navigator assisters it employs, supervises, or is affiliated with.</p>	<p>Registration includes completion of this form: <a href="https://oci.wi.gov/Documents/OCIForms/11-092.xls">https://oci.wi.gov/Documents/OCIForms/11-092.xls</a> and submission to <a href="mailto:ocialdocuments@wisconsin.gov">ocialdocuments@wisconsin.gov</a>. Each time a CAC becomes affiliated with, or dis-associated from, the organization, the organization must update its listing with OCI by completing this same form and submitting it to <a href="mailto:ocialdocuments@wisconsin.gov">ocialdocuments@wisconsin.gov</a></p>	

## 2022 CERTIFIED APPLICATION COUNSELOR REQUIREMENTS

ONGOING CAC REQUIREMENTS TO MAINTAIN CERTIFICATION– STATE OF WISCONSIN		
<ul style="list-style-type: none"> <li>These activities need to be maintained on an ongoing basis</li> </ul>		
State Requirement	Instructions	Complete?
<p><b>1. Continuing Education Requirements:</b> Each individual CAC must complete and appropriately attest to 8 CE credits prior to October 1 of each year.</p>	<p>Guidance on this process can be found here:  <a href="https://oci.wi.gov/Documents/AgentsAgencies/NavigatorCEGuidanceMemo.pdf">https://oci.wi.gov/Documents/AgentsAgencies/NavigatorCEGuidanceMemo.pdf</a>.                      The Office of the Commissioner of Insurance (OCI) does not require prior approval of the course content. Training that includes the following topics satisfies the requirement:</p> <ol style="list-style-type: none"> <li>1. Principles of health insurance</li> <li>2. Wisconsin health insurance laws and regulations</li> <li>3. Public health program law, regulations and guidance including BadgerCare and Medicare</li> <li>4. Federal Affordable Care Act law, regulations, and guidance</li> <li>5. Privacy and Security Guidelines - Personally Identifiable Information</li> </ol> <p>In addition, CAC organizations must attest to each CACs completion 8 CE credits by October 1 of each year by using this form:  <a href="https://oci.wi.gov/Documents/OCIForms/11-094.xls">https://oci.wi.gov/Documents/OCIForms/11-094.xls</a>.</p>	

## 2022 CERTIFIED APPLICATION COUNSELOR REQUIREMENTS

### ONGOING CAC REQUIREMENTS TO MAINTAIN CERTIFICATION – Federal

- **These activities need to be maintained on an ongoing basis**

Federal Requirement	Instructions	Complete?
<p><b>1. Re-certification Training</b></p>	<p>Each CAC must successfully complete re-certification training on an annual basis. CMS encourages all CACs to take the new training even in cases where the CAC’s annual re-certification may not be due for several months. Training is now available.</p> <p><a href="#">CMS Training Materials Page</a> – Lists all CMS Federally-facilitated Marketplace (FFM) Assister training materials.</p>	
<p><b>2. Ensure that CAC certificates and agreements with CAC-Organizations are up to date.</b></p>	<p>CMS allows each individual CAC Organization to determine a process by which affiliated CACs can confirm they have met the necessary training requirements. Each organization must be sure that their agreements with CACs are up to date and that each CAC is issued a new official CAC certificate with an expiration date that is one year from the date of issuance. For more information see <a href="#">the 2022 Assister Certification Bulletin</a>.</p>	

## 2022 CERTIFIED APPLICATION COUNSELOR REQUIREMENTS

### SAMPLE CONTINUING EDUCATION TRACKING TOOL

*Use when tracking Wisconsin Office of the Commissioner of Insurance continuing education requirements*

Each CAC must complete 8 hours of Continuing Education prior to October 1<sup>st</sup> of each year. Below are the [requirements for maintaining adequate documentation](#) of continuing education courses.

CAC Name	CAC Number	Training agenda	Hours completed	Method of learning	Location	Date	Proof of attendance