



MARYLAND HEALTH CONNECTION

BROKERS

STEP BY STEP GUIDE 24-25



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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 2024-2025 plan year. Follow these instructions in order to fulfill your training obligations and ensure that you are able to assist your clients with their enrollments.

Major Training Milestones for the 2024-2025 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 2024-2025 (See Chart below). Required training must be completed within 45 days once your application is approved.

OE 2024-2025 Training Requirement Chart

Open Enrollment Training Requirement Chart (X=Required)						
Course	New Broker: Individual & Small Biz	New Broker: Individual Only	New Broker: Small Biz Only	Returning Broker: Individual & Small Biz	Returning Broker: Individual Only	Returning Broker: Small Biz Only
2024 Pre-Authorization Training Curriculum	x	x	x	n/a	n/a	n/a
2024 Annual Training Curriculum	n/a	n/a	n/a	x	x	x
Consumer Portal System Learning Resources	x	x	x	optional	optional	optional



Step-by-Step Instructions



MHBE Training Account Creation/Application

Account Creation

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

Note: If you already have a MHBE Portal for CAW Registration & Application Account, skip to page 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. On the left, there are input fields for Username and Password, a Login button, a checkbox for 'Remember me', a link for 'Forgot Password?', and a Register button highlighted with a red box. On the right, there is a welcome message and a list of four steps for account creation and application submission. At the bottom left, there is a small Maryland state flag icon.

maryland health connectionSM

Username
Password

Login

☒ Remember me

[Forgot Password?](#)

Register

Welcome to the MHBE Portal for CAW Registration and Application

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

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

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

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

maryland health connectionSM

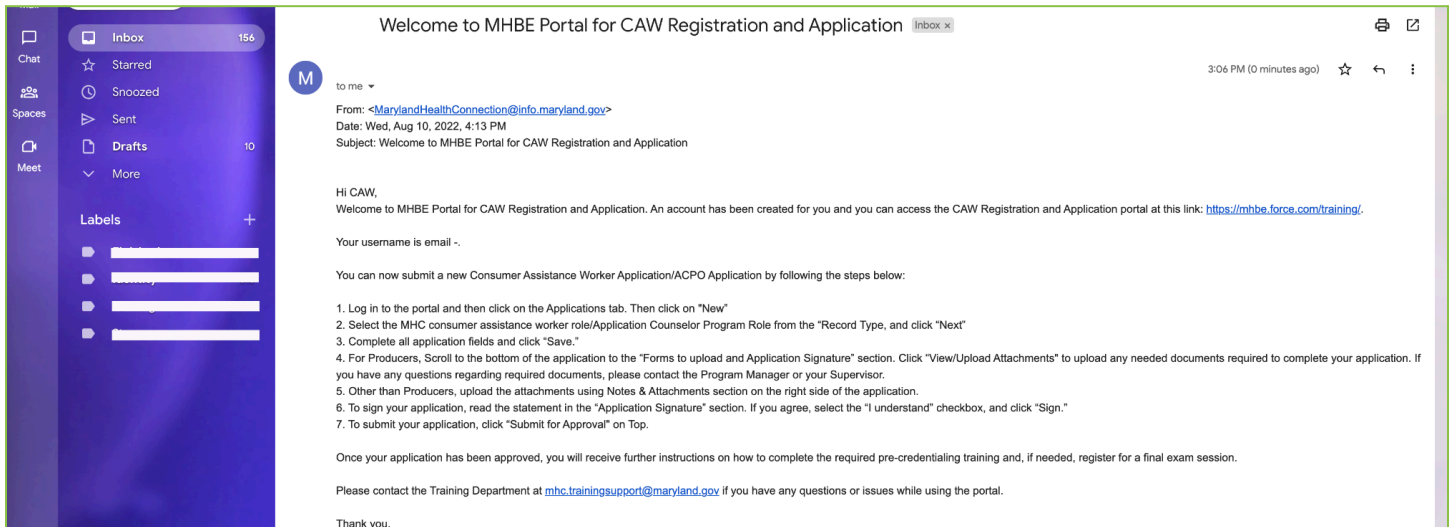
Welcome to MHBE Training Portal Self Registration Page. Please enter all details below to create a new account. Your password should be at least 10 characters long and should be a mix of characters and numbers. Please contact mhc.trainingsupport@maryland.gov if you have any issues creating an account.

First Name
Last Name
Email
Password
Confirm Password

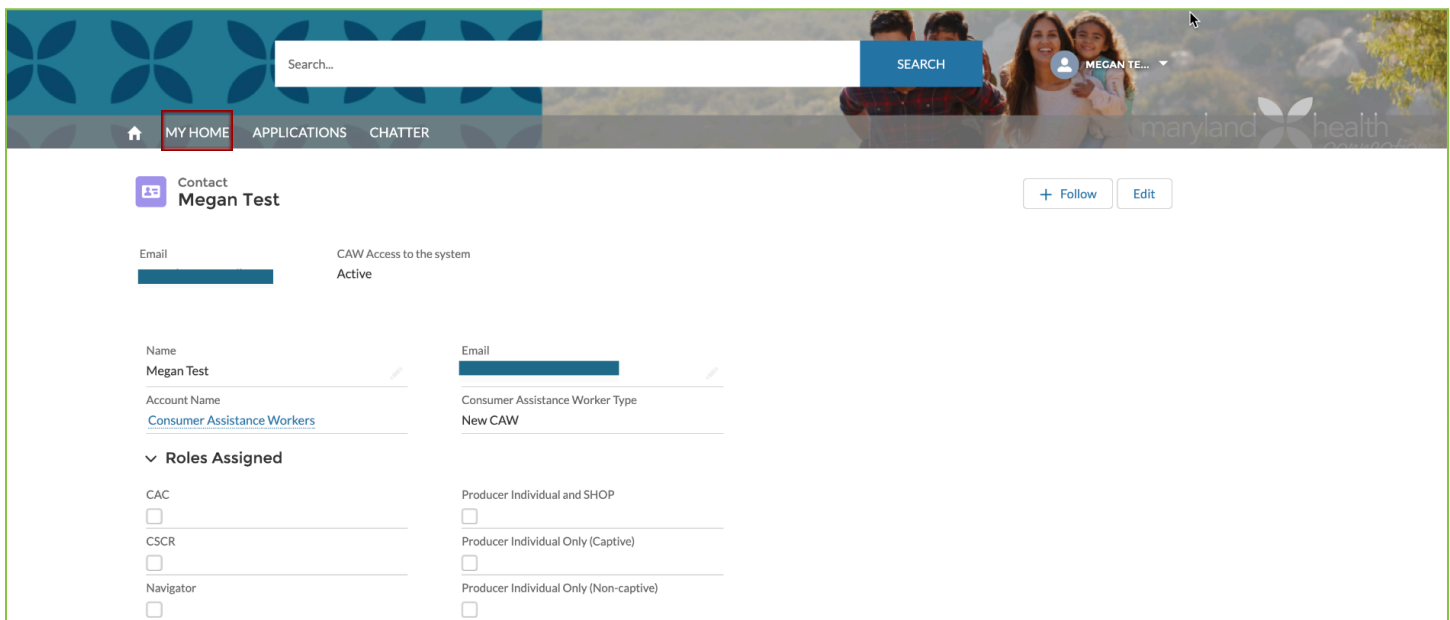
Submit

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

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

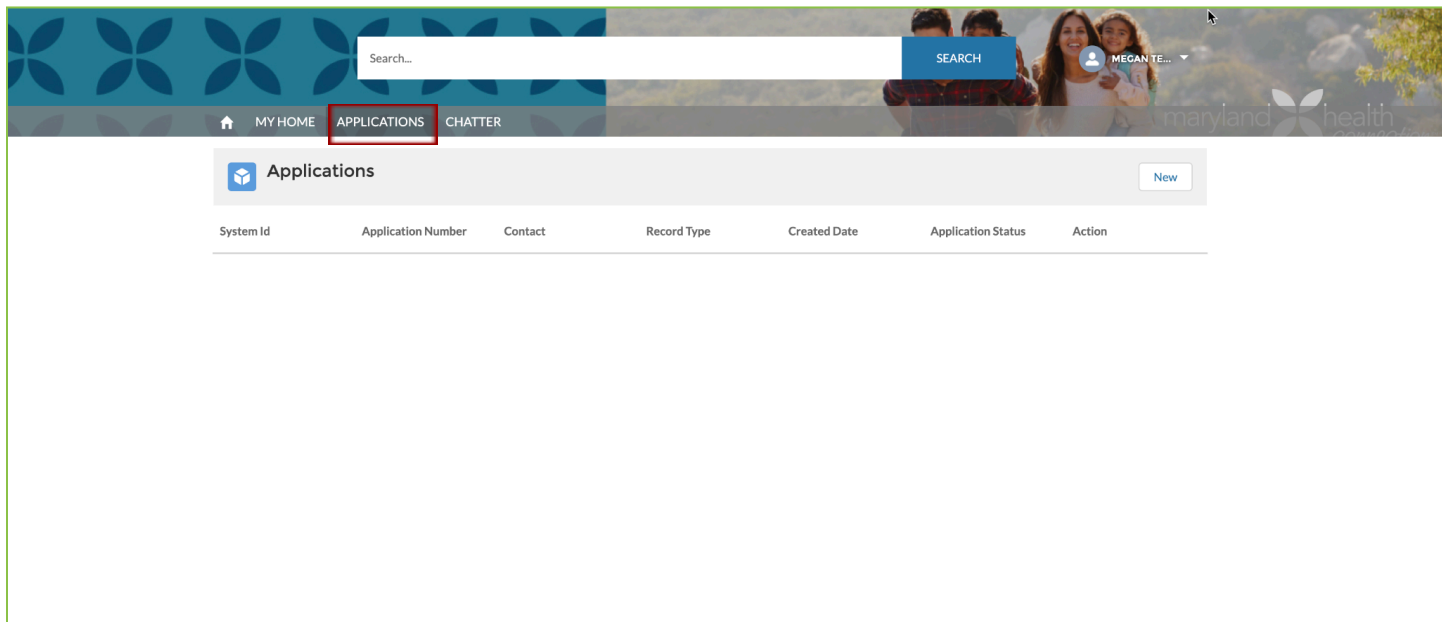


4. Click on the **Home Tab**. This shows an overview of the information you entered when creating an account as well as any CAW roles that were approved and assigned to your account.



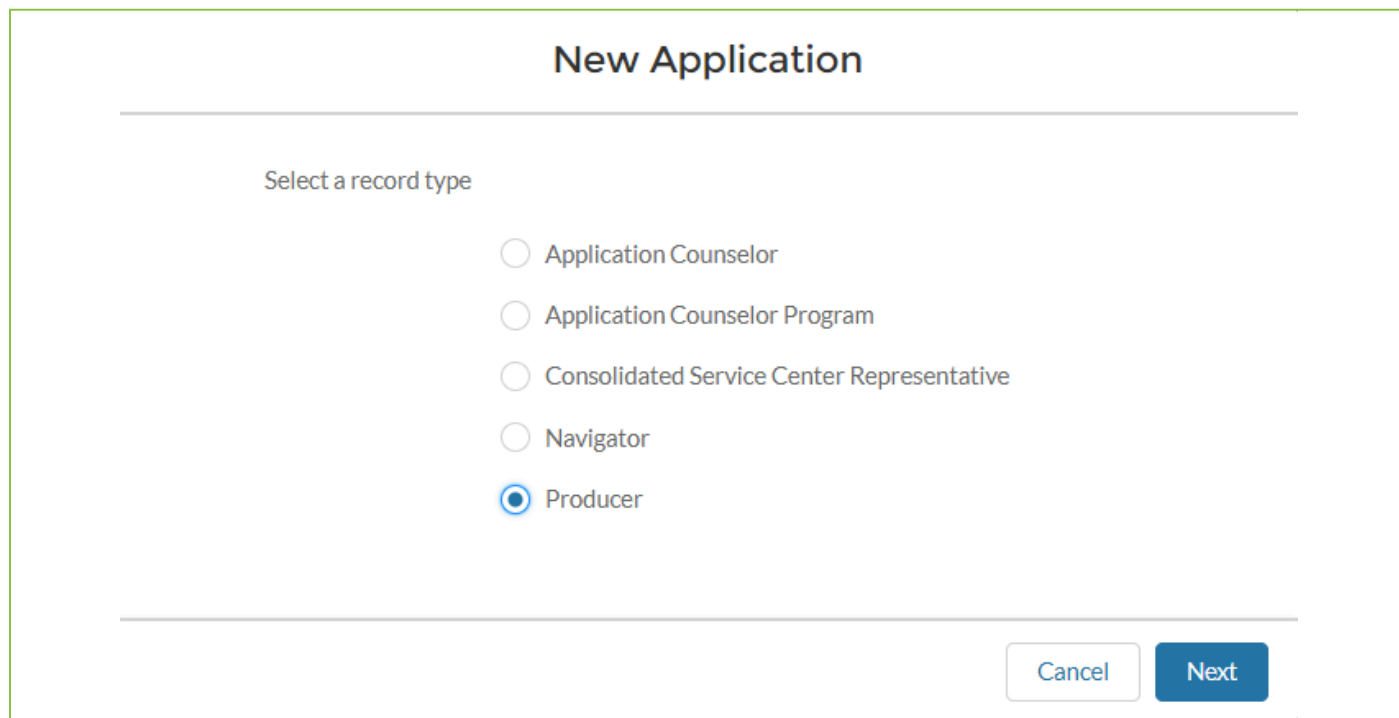
Application

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



The screenshot shows the top navigation bar with a search bar, a user profile for MEGAN TE..., and a navigation menu with 'MY HOME', 'APPLICATIONS' (highlighted with a red box), and 'CHATTER'. Below the navigation bar is a section titled 'Applications' with a 'New' button. Underneath is a table with columns: System Id, Application Number, Contact, Record Type, Created Date, Application Status, and Action.

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



The screenshot shows the 'New Application' form. It has a title 'New Application' and a section 'Select a record type' with five radio button options: 'Application Counselor', 'Application Counselor Program', 'Consolidated Service Center Representative', 'Navigator', and 'Producer' (which is selected). At the bottom right are 'Cancel' and 'Next' buttons.

3. Enter requested information into the application fields:

- Company/Agency Name – this is visible to consumers
- Company Agency Website – this is visible to consumers
- Languages spoken other than English – this is visible to consumers
- Assistance Offered Email
- Assistance Offered in Person
- Assistance Offered Phone
- National Producer Number – ensure this number matches your license
- Maryland Insurance License Number – ensure this number matches your license
- Authorization for Individual Exchange?
- Seeking Authorization for Small Business?
- Visible to consumers - Individual?
- Visible to consumers - Small Biz?
- Are you a Captive Producer? – this is only if you work directly with one carrier
- What Connector Entity Region do you work? (What region do you primarily work with?)
– this is used by Connector Entities to refer consumers to brokers

Enter your Address Information:

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


Enter your Contact Information:

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

4. Please review the entire application. If you are not ready to submit the application, you will be able to log out and come back to edit any information before submitting for approval.

Brokers will need to 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

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.

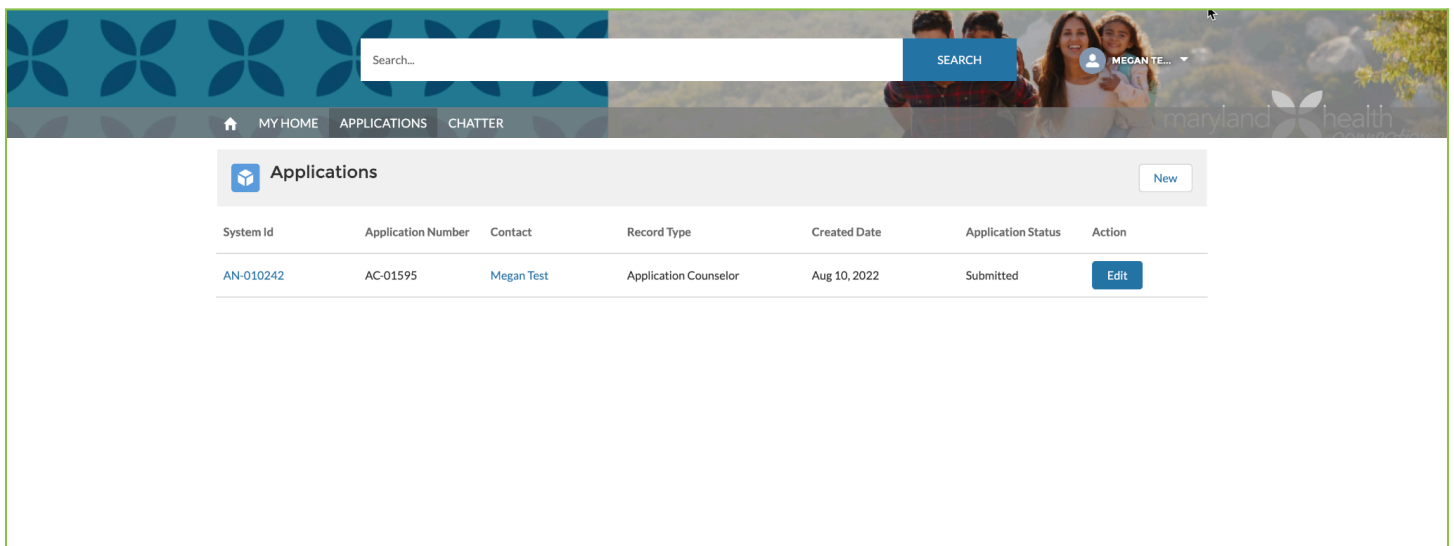
9. Submit the application for approval by clicking **Submit for Approval**. This button is located at the top right of your application. A small window will appear. Add any comments, and then click **Submit**.

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.



Search...

SEARCH

MEGAN TE...

maryland health

Applications

New

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

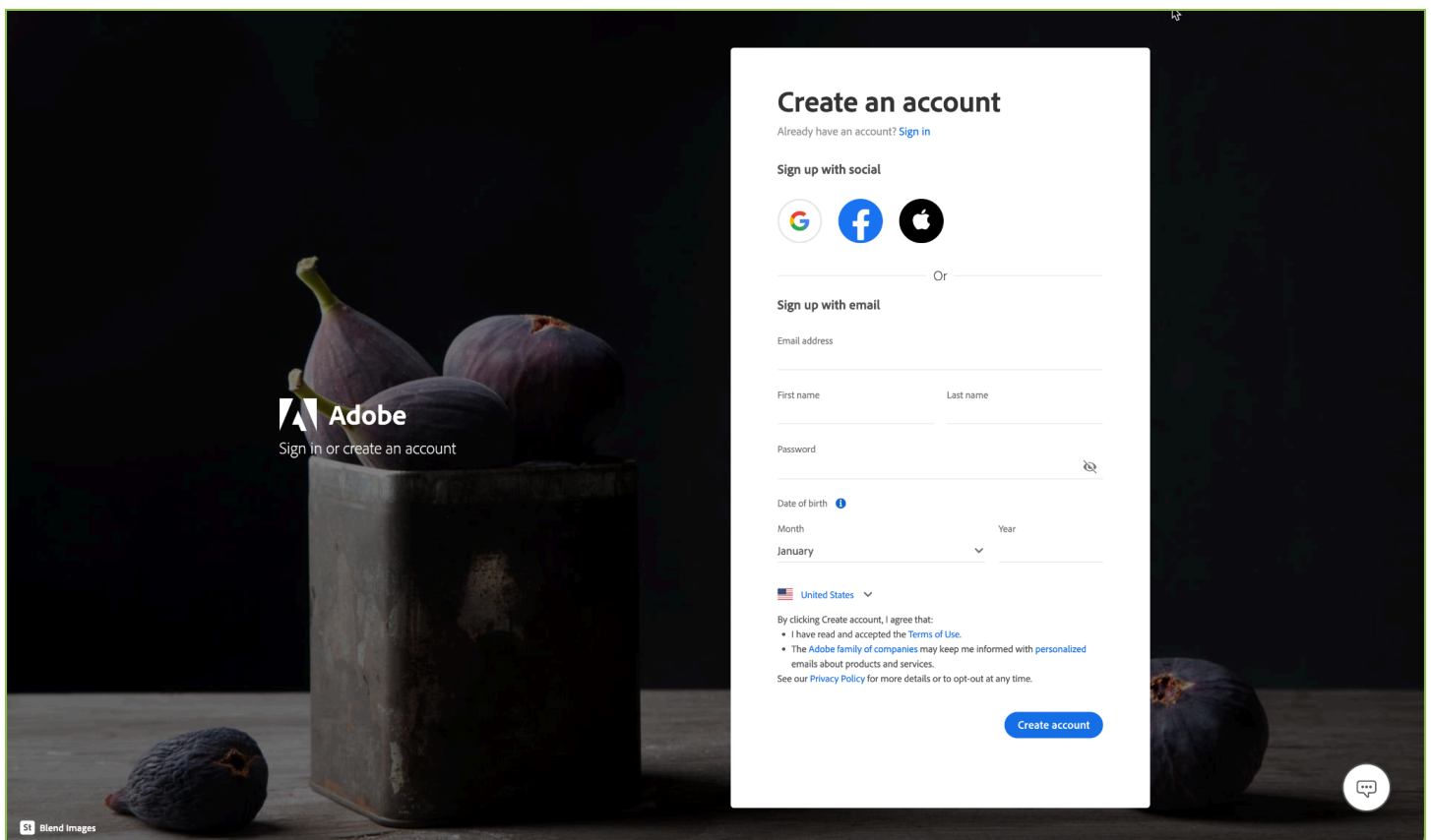


Account Creation

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

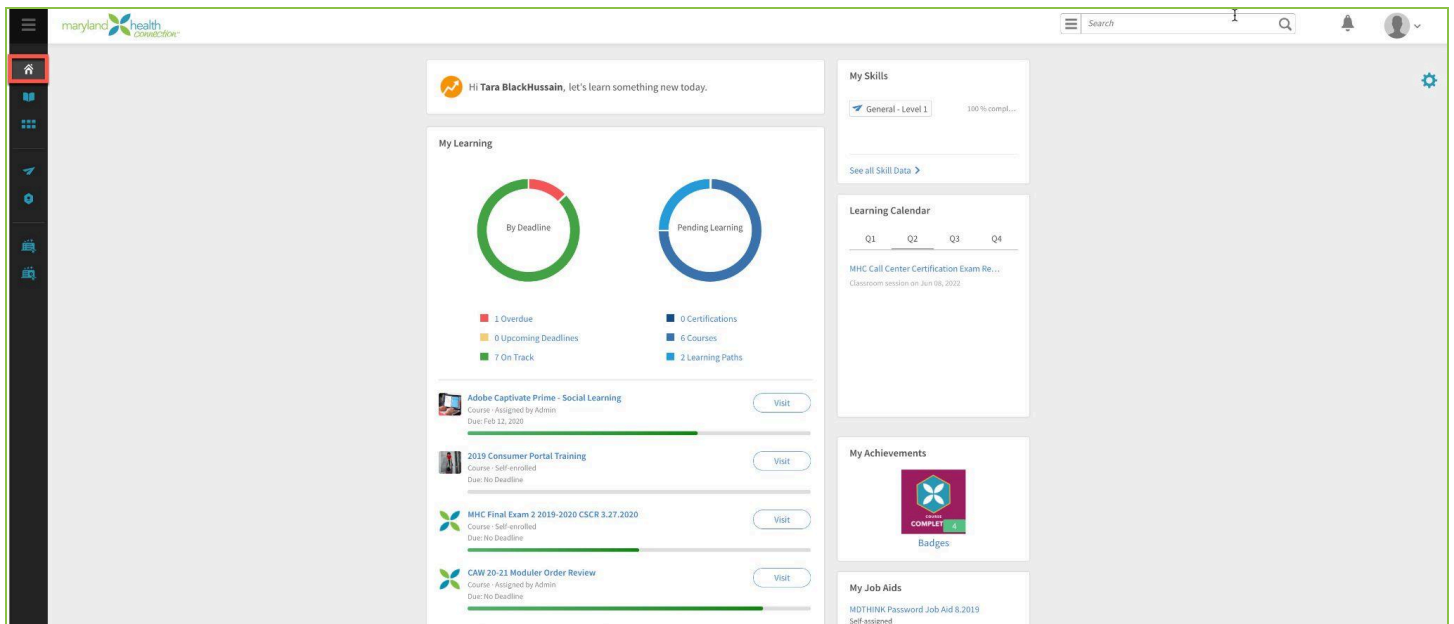
In addition, please make note as you create your account that your password must:

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

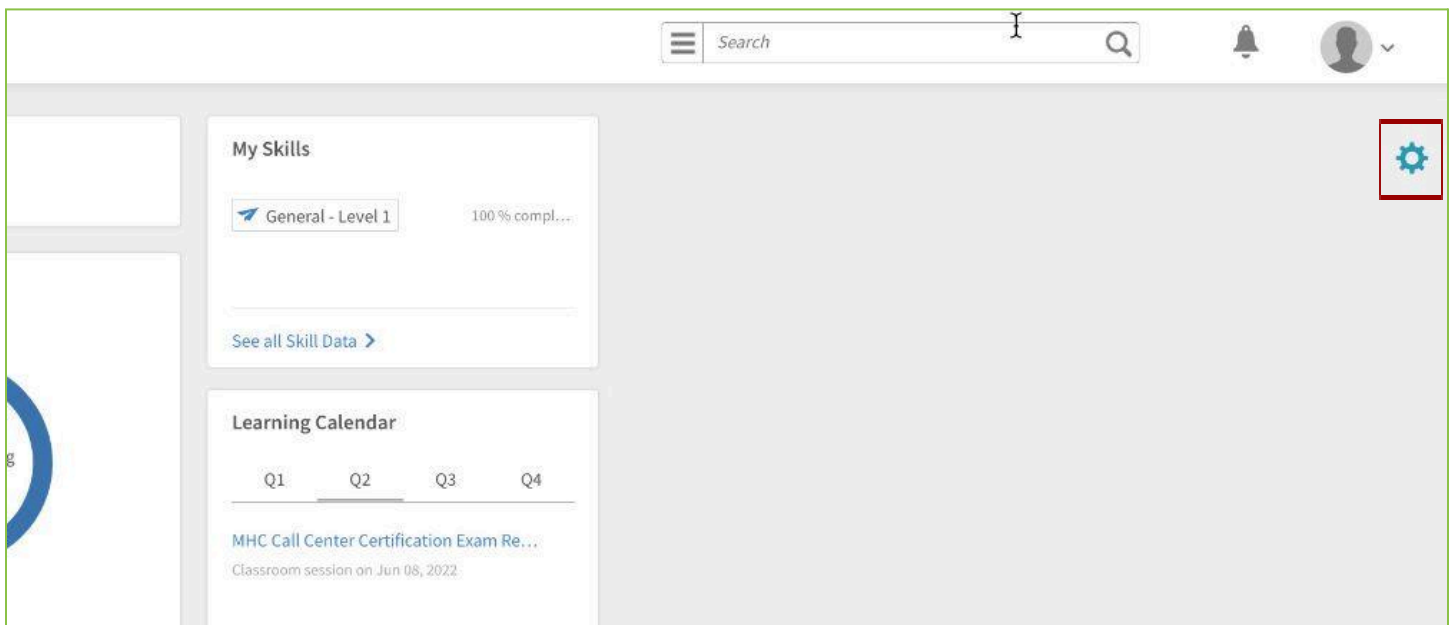


Navigating the Learner Dashboard

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

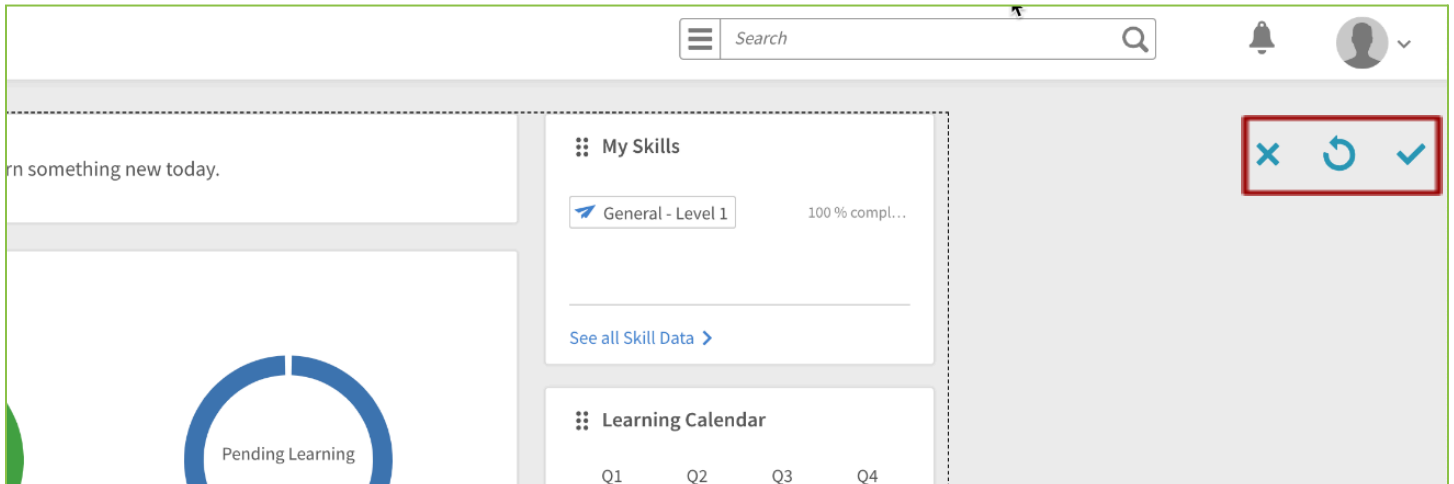


2. The Dashboard helps you organize your training. It can be customized by clicking the gear button in the upper right corner.



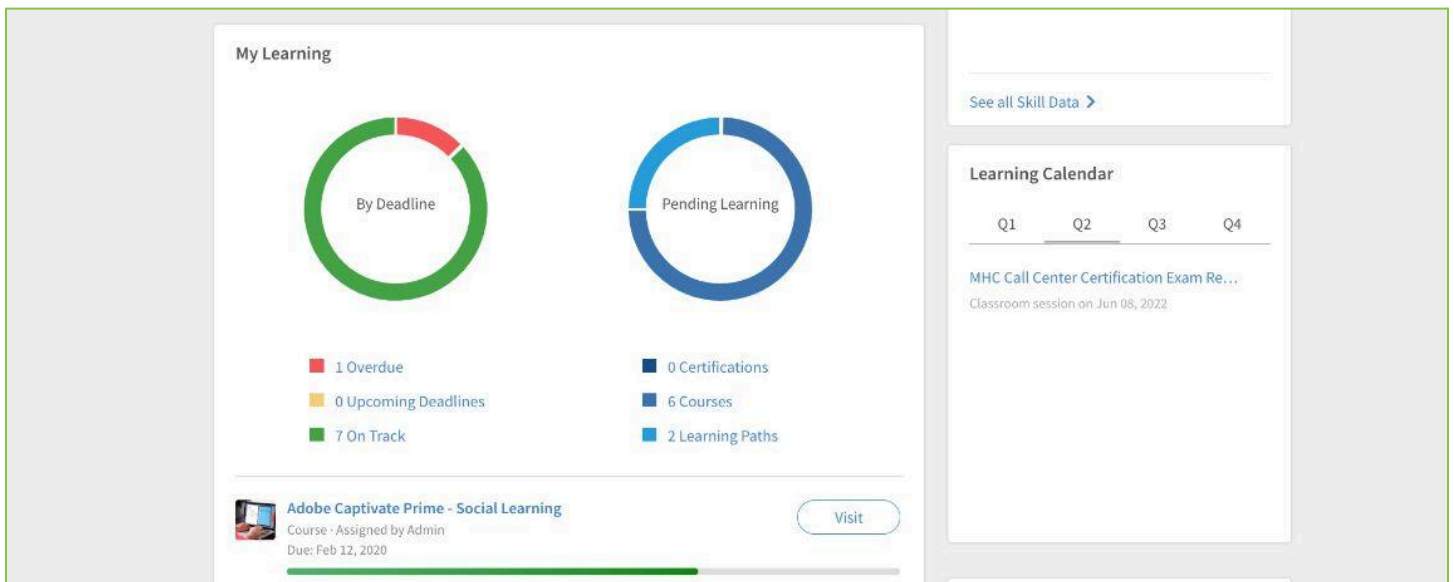
- When you click on the gear button, a dotted line will appear around your profile. Once it does, you can drag and drop the “widgets” (pieces of your profile) around within that space to organize them the way you prefer.

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

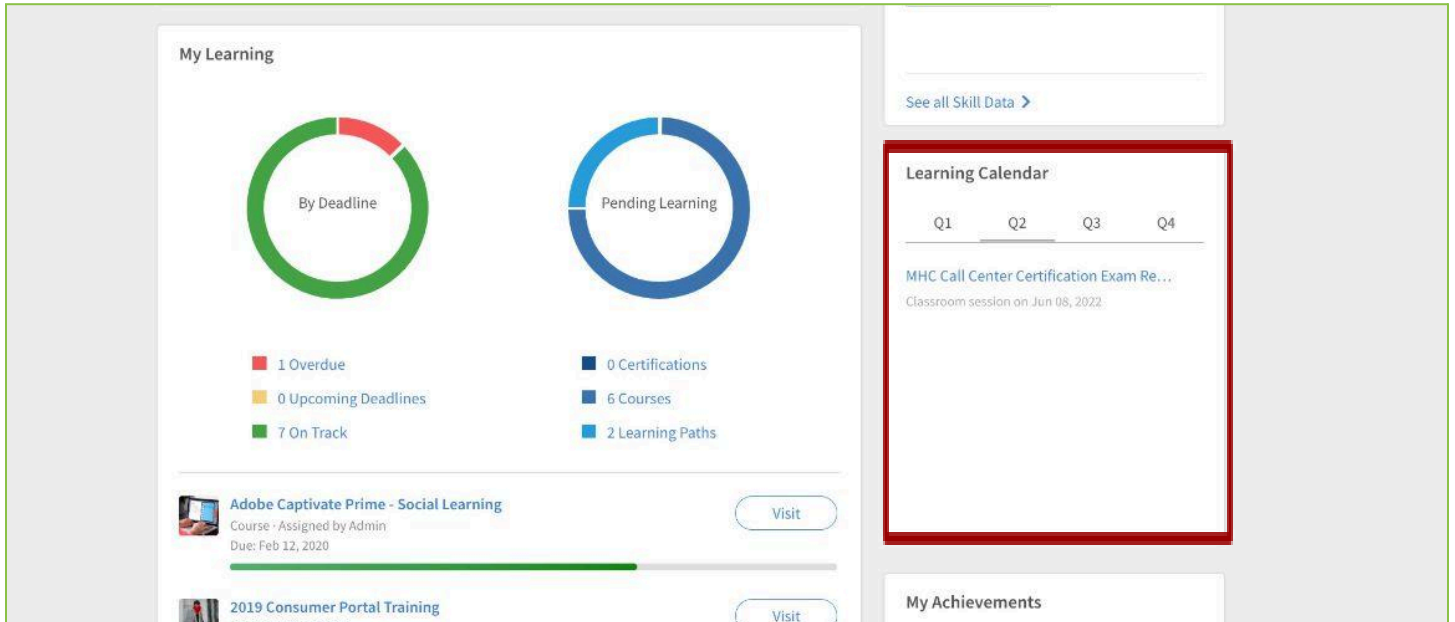


- The “By Deadline” donut on your screen lets you know about training that’s overdue (in red) or nearing a deadline (in yellow). The “Pending Learning” donut on your screen uses shades of blue to let you know about courses and learning programs that have been assigned to you.

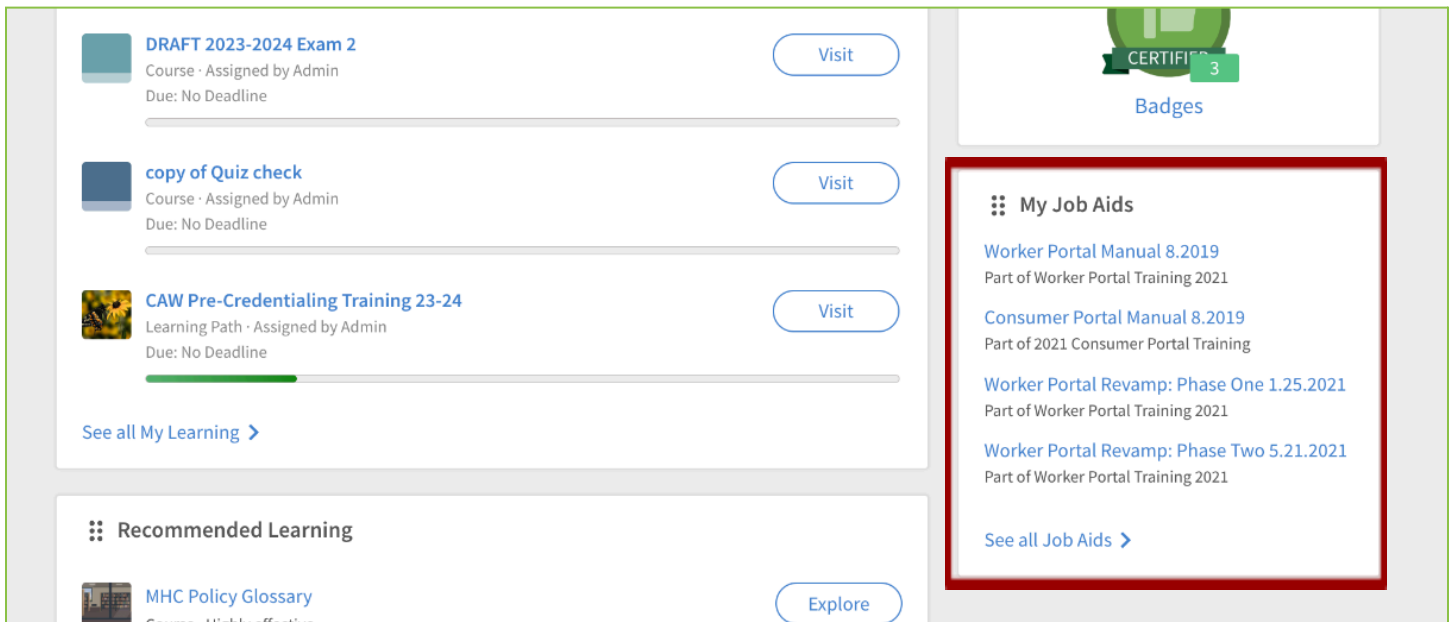
You can launch any of those trainings from the list directly below the donuts. Note that this area contains only training that you are ALREADY enrolled in. If you want to find any other training or job aids available to you, you will use the catalog tab to enroll in training courses and view job aids.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



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



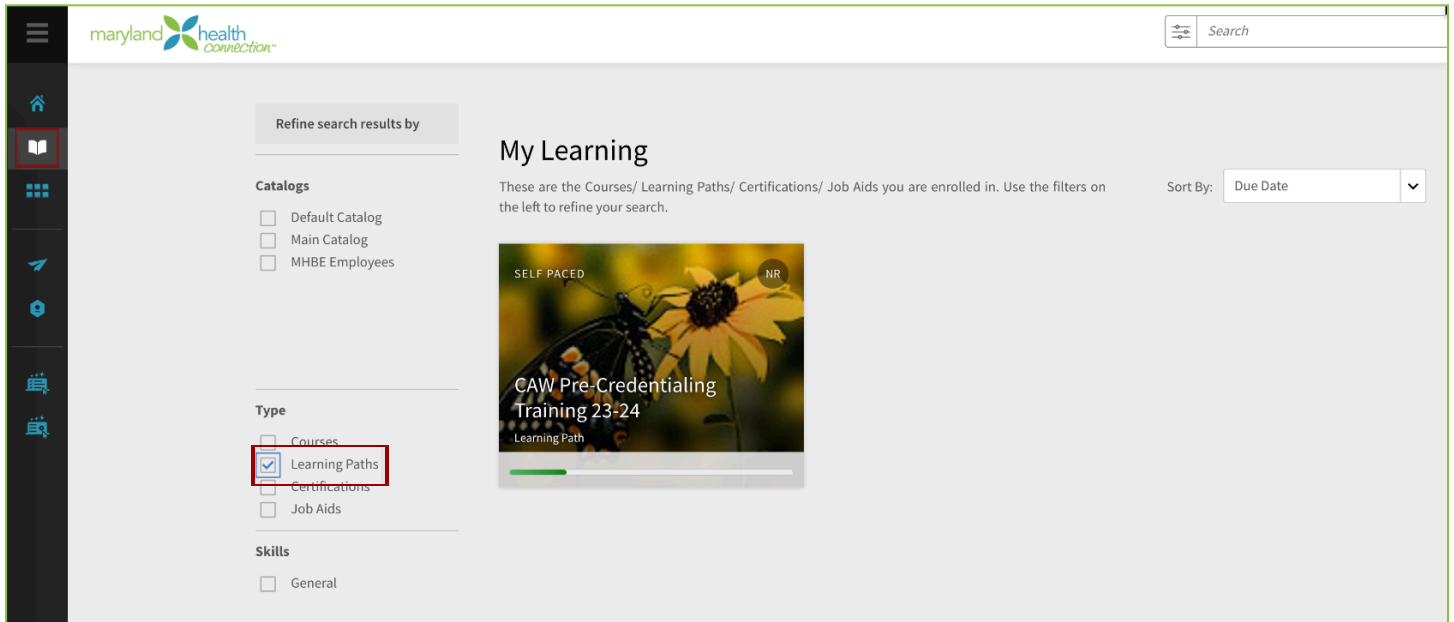
6. Beneath your calendar and across from your recommended training list, you will see the Job Aids widget. This is where you will find any job aids assigned to you.



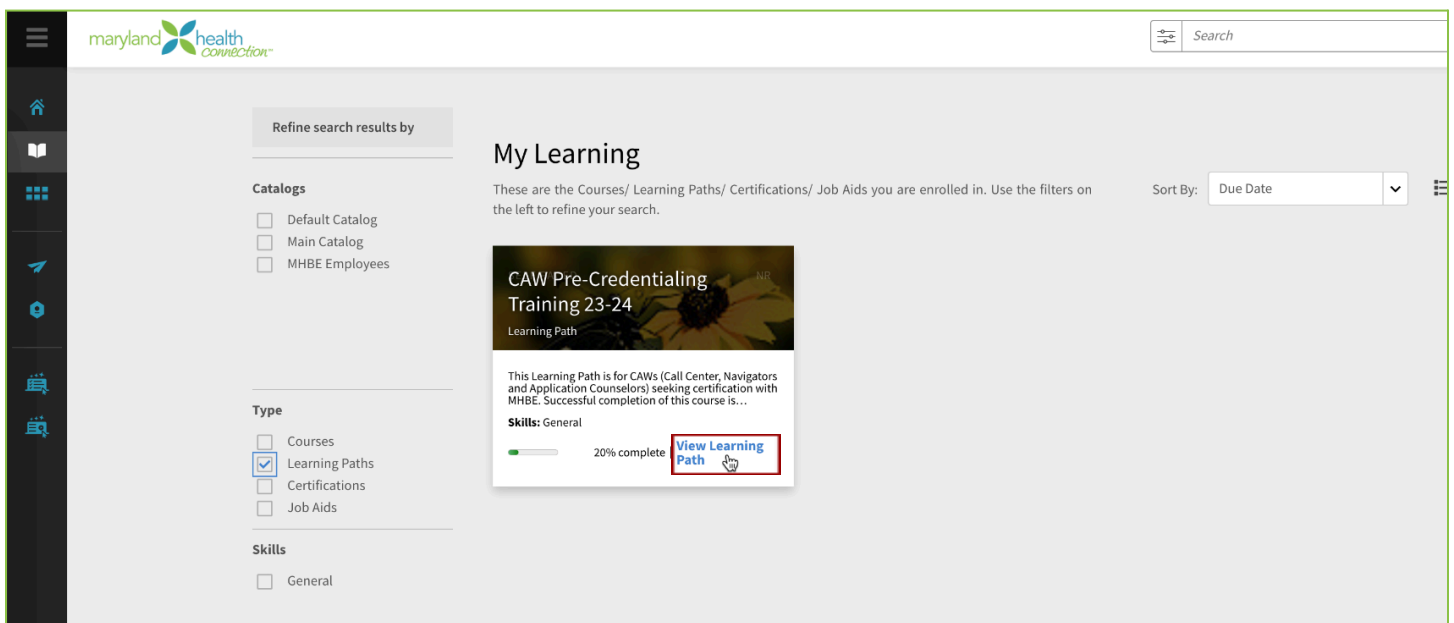
Enrolling in the Learning Path

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

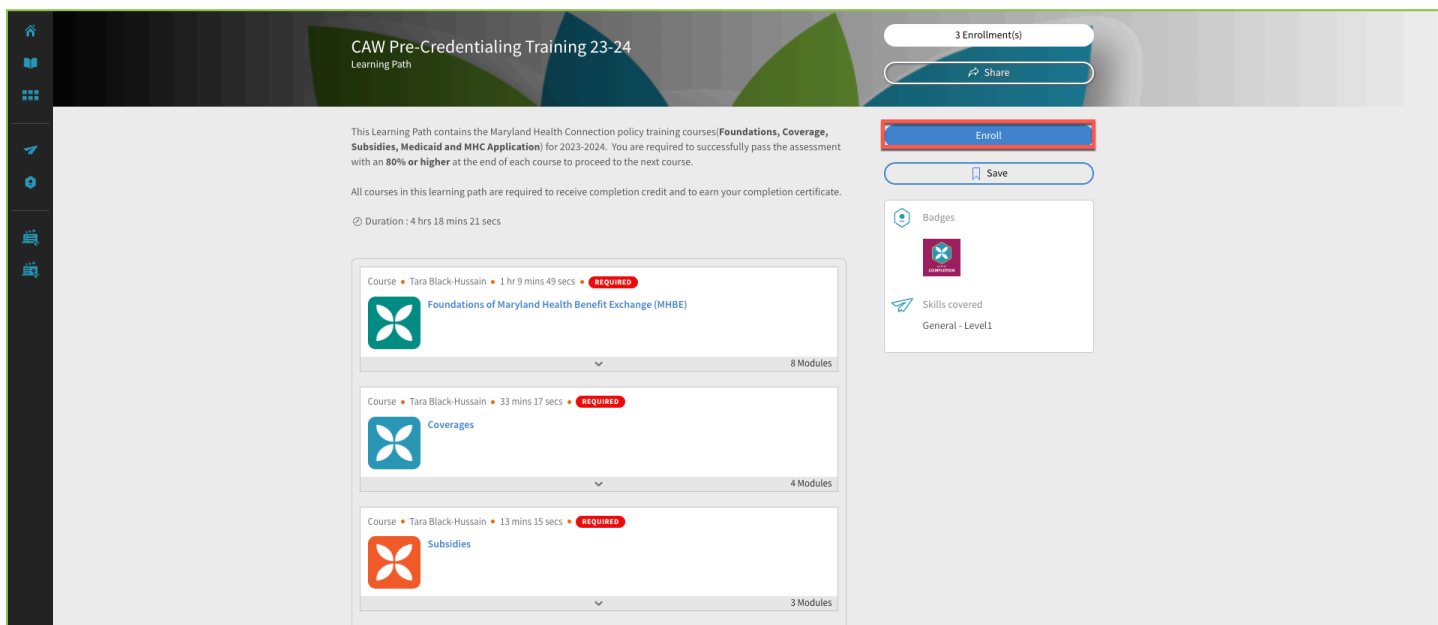
On the left pane, click on your Catalog tab. Under "Type", click the check-box listed as Learning Path.



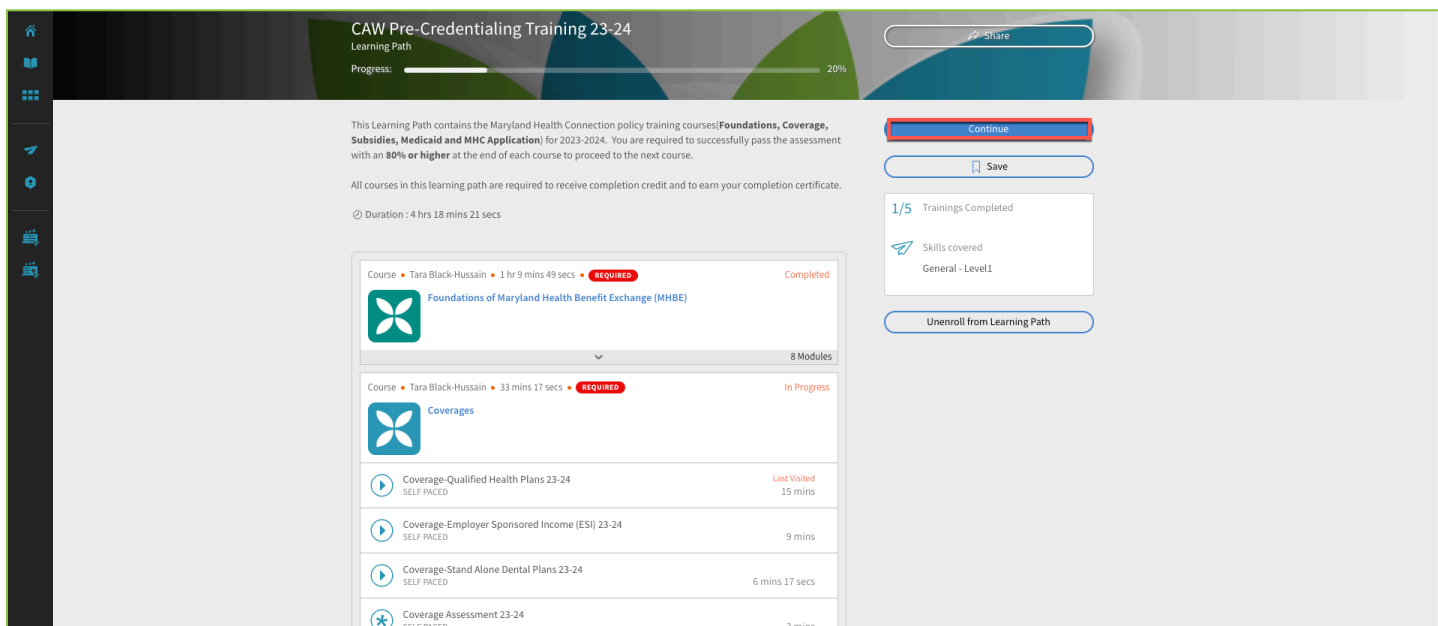
2. Hover the mouse to the lower right corner of your learning program and click **View Learning Path**.



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

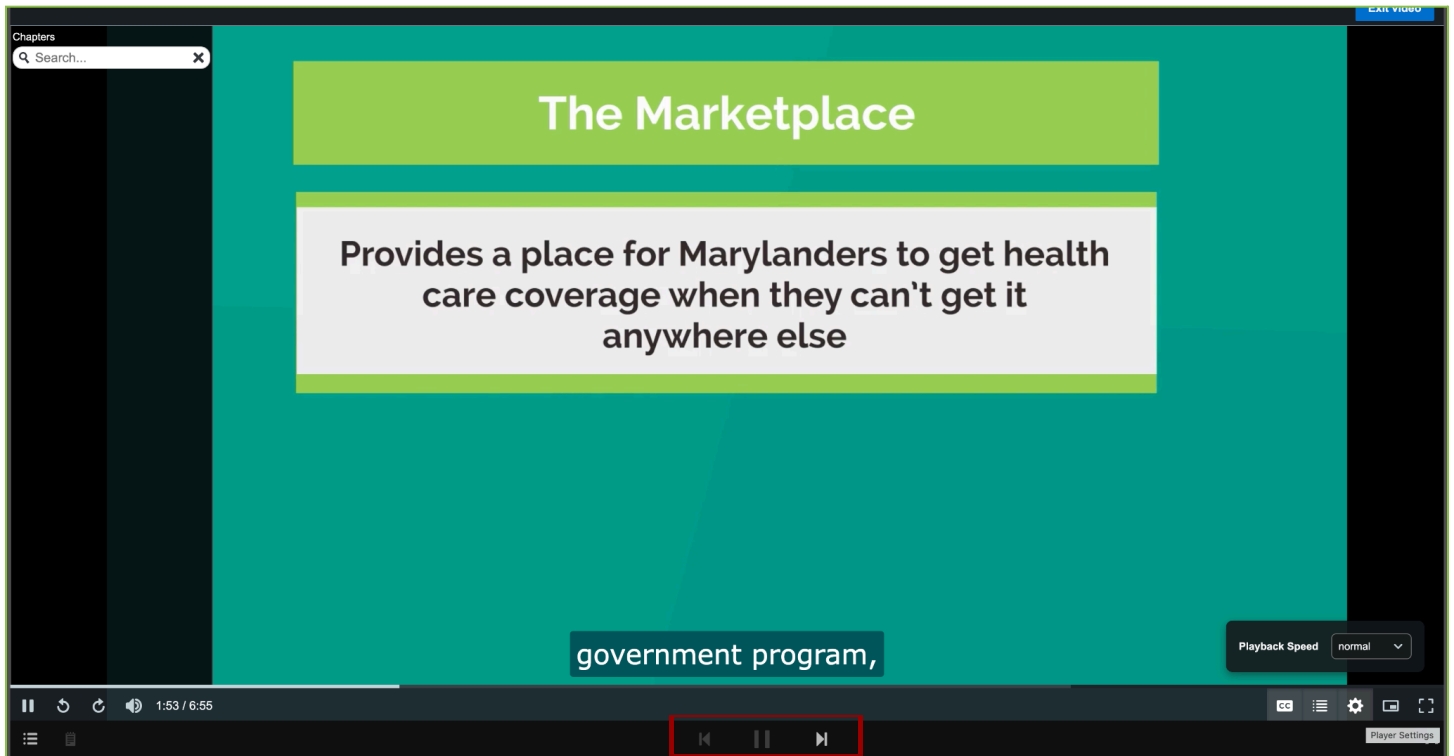


4. If you need to resume your training another time or day. Go back to the caw pre-credentialing training learning path and click the blue “continue” to pick up where you left off.

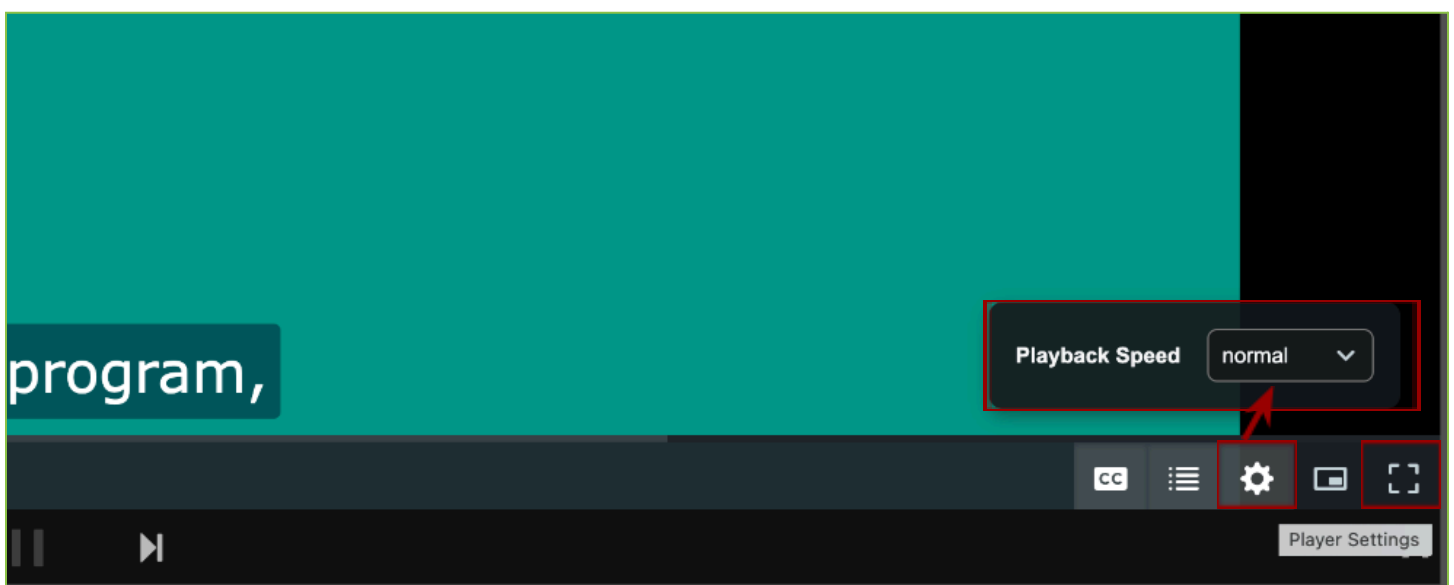


Using the Player

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.



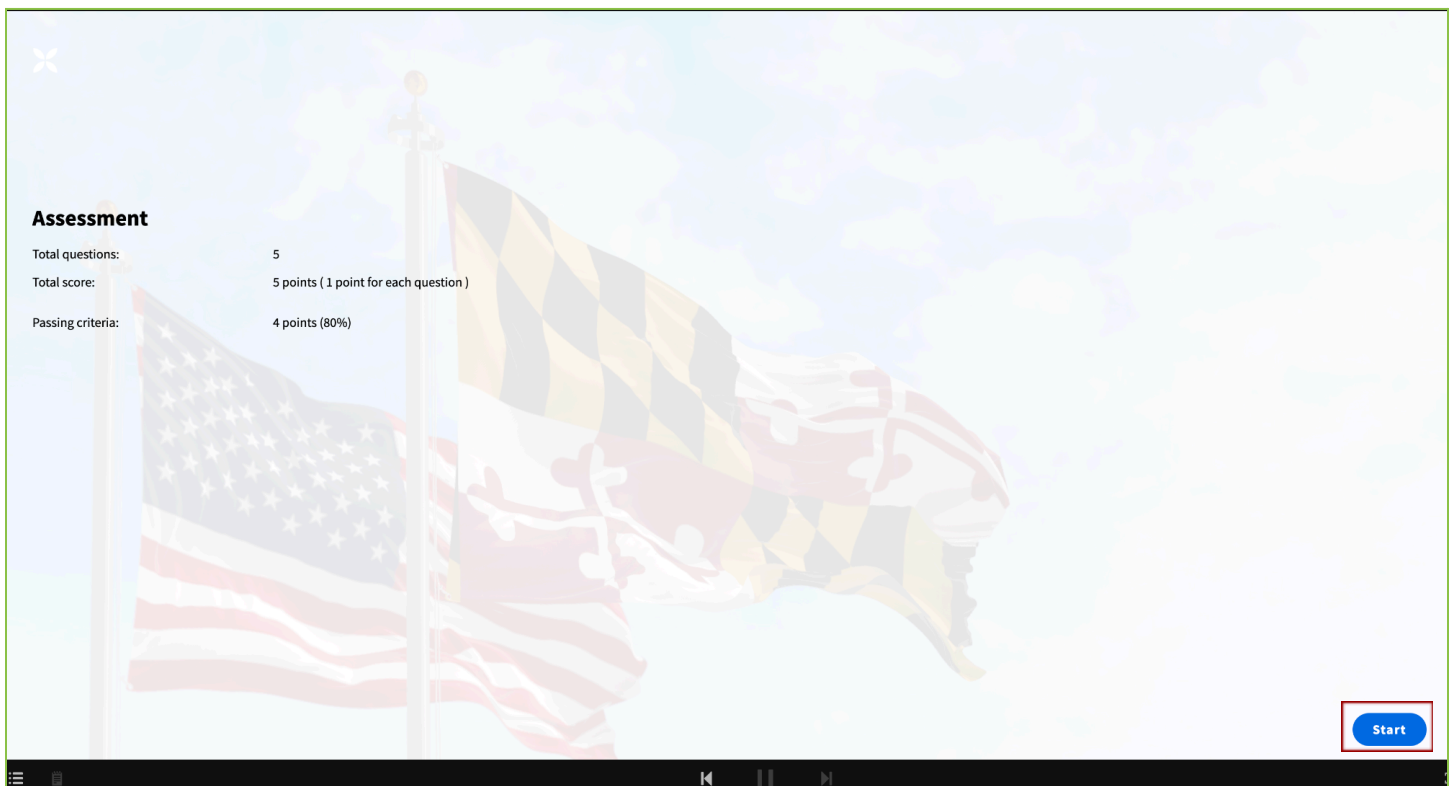
2. At the bottom right corner of the player, you will have the option to open the Player Settings gear to control the Player Speed, or the Full Screen button to expand the screen view.



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.

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
SELF PACED  Reattempt Last Visited 5 mins


[Continue](#)

[Save](#)

0/1 Core Content Completed

 Badges

 COMPLETION

 Skills covered

Broker Pre-Authorization Assessment

To finish training, brokers must successfully complete the Broker Pre-Authorization Assessment within their learning path.

- “Individual Only” and “Individual + Small Business”: Must correctly answer four out of five questions
- “Small Business Only”: Must correctly answer two out of two questions
- This assessment can be taken an unlimited number of times
- After an unsuccessful attempt, the quiz window must be closed and the broker must select “Reattempt” to try again.

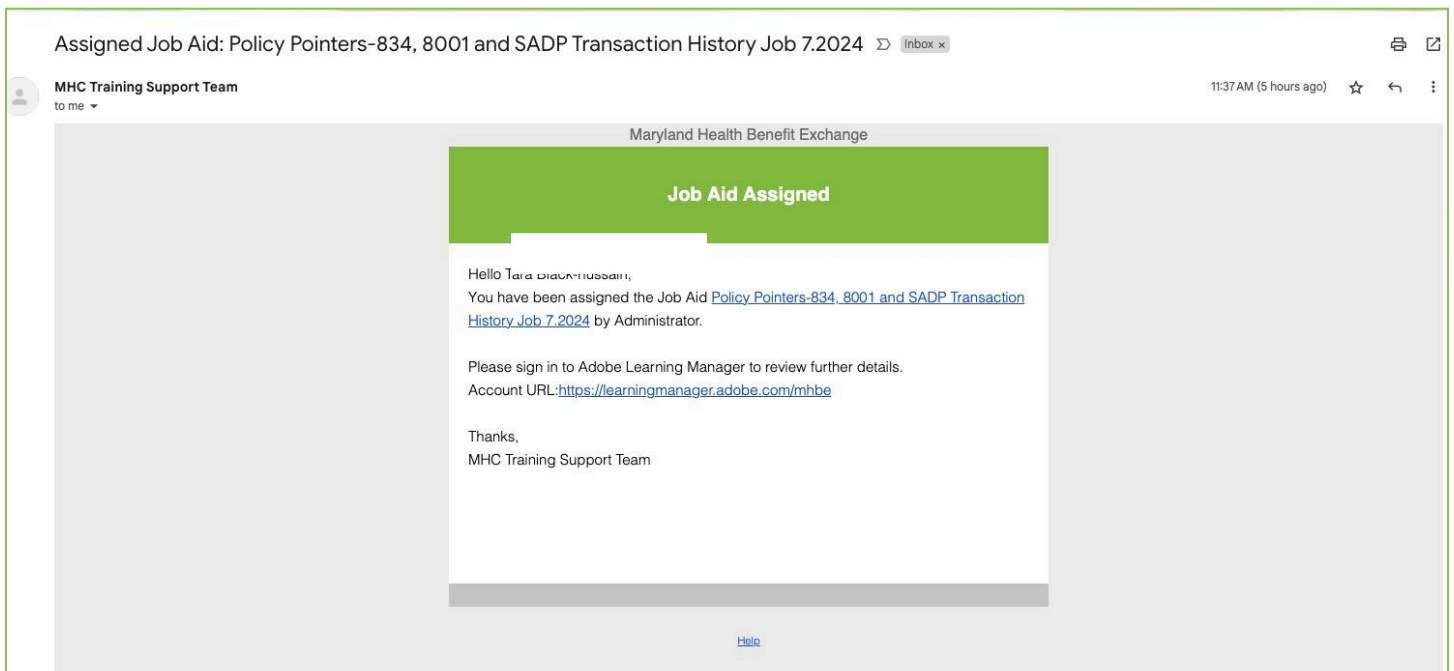
The screenshot displays a user interface for the Broker Pre-Authorization Assessment. At the top left, it states "No description available". Below this, there are tabs for "Modules" and "Notes". The "Modules" tab is active, showing a list of modules. The first module is "Core Content", which is marked as "5 mins". Below the module name, there is a "QnA" icon and the text "SHOP ONLY Broker Pre-Authorization Assessment 24-25". Below this, it says "SELF PACED" and "Last Visited 5 mins". A red box highlights a "Reattempt" button. On the right side of the interface, there are two buttons: "Continue" and "Save". Below these buttons, there is a section titled "0/1 Core Content Completed". This section includes a "Badges" area with a "COMPLETION" badge and a "Skills covered" section with a paper plane icon.

Job Aids

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.

2021 Caseworker Annual Compliance Training
Course · Highly effective
[Explore](#)

MHC Online Final Exam 1 2022-2023-CAC-NAV-8.2022
Course · Recently published
[Explore](#)

MHC Online Final Exam 2 2022-2023-CAC-NAV-8.2022
Course · Recently published
[Explore](#)

[Explore Catalog >](#)

Worker Portal Revamp: Phase One 1.25.2021
Part of Worker Portal Training 2021

Worker Portal Revamp: Phase Two 5.21.2021
Part of Worker Portal Training 2021

[See all Job Aids >](#)

[Help](#) [Contact Admin](#)

Welcome to the Adobe Learning Manager User Guide

Search Adobe Support

Learning Manager User Guide

- > Introduction
- > Get Started
- > Administrator
- > Integration Admin
- > Authors
- > Instructor
- > **Learner**
- > Manager
- > Frequently Asked Questions
- > Knowledge Base

Last updated on Jul 18, 2022

Read on to know what is the latest offering in Adobe Learning Manager. Start at the beginning, visit each section individually, or connect with the Community to work your way through a project.

Join the conversation

Visit the [Adobe Learning Manager User Community](#) to be inspired and get answers to top questions.

Popular topics

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When you're ready to upgrade, find the path that's right for you
[Choose a plan](#)

Megan Neal
[Manage account](#)

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



After You Have Completed Training

Congratulations! You have now completed your required training!

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

If you are a new broker: 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.

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.