



BROKER RECERTIFICATION UPDATE
FINANCE & OPERATIONS COMMITTEE
MAY 22, 2017

OE4 Training Overview

Who Was Trained?

- Returning Brokers/Agents: **883**
- New Brokers/Agents: **134**
- Web Brokers/Agency: **188**
- Dedicated Carrier Sales Reps: **401**
- Service Center Customer Service Reps: **129**
- Certified Application Counselors: **303**
- Health Coverage Guides: **108**

OE4 Training Overview

How Were New Brokers Certified?



Background Check



New Broker Coursework

Comprehensive modules and quizzes – 12 Hours of Content



Certified Producer Agreement



Certificate

OE4 Training Overview

How Were Returning Brokers Trained?



Returning Broker Coursework

Comprehensive modules and quizzes – 6 Hours of New and Updated Content through the Learning Management System



Certified Producer Agreement



Certificate

OE5 Training Preview

Returning Brokers Training Requests

Top Training Requests from Returning Brokers:



1. **Start Sooner:** open re-certification training earlier in the year
2. **Show the steps:** go through the PEAK application in-depth, screen by screen, and click by click
3. **Avoid the pitfalls:** show how to avoid getting clients stuck and if already stuck, how to get unstuck
4. **Guide through renewals:** help us guide clients through all the renewal options

OE5 Training Preview

Returning Broker Re-Certification Training: Starting July 1

Learning Path: Modules in <https://training.connectforhealthco.com>

Total Length: 6 CEU Hours and Complete Re-Certification Training

All Modules: Learning Content plus Quiz (80% pass rate) – available anytime, anywhere



Each Module:

- < 30 minutes in length
- Includes either video, pre-recorded webinar, or interactive step-by-step and screen-by-screen showing of the application/process
- Includes additional documentation in the Resource Library

Example: SES Application Updates/Changes – Step by Step video or webinar of the screens and questions, followed by a quiz.

OE5 Training Preview

Returning Brokers Training



Returning Broker Coursework: Comprehensive, New and Updated

- Training starts July 1, 2017.
- Updated content will include pre-recorded short Webinars, covering:
 - Verifications
 - Changes/Updates to the SES Application
 - Life Cycle of Problem Resolution
 - How to Get a Real Time Eligibility Determination
 - Processing Life Change Events
 - Updates on the Small Business Marketplace
 - Renewals
- Elective/Optional Content to be added in September and in Resource Library



Certified Producer Agreement



Certificate