



# **BROKER RECERTIFICATION UPDATE**

**BOARD OF DIRECTORS MEETING**

**JUNE 12, 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 Certified?



### **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 Broker 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 Recertification Training Starts 07/01/2017

- **Coursework: Comprehensive, New and Updated**
- **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 to the Resource Library in LMS
- **Total Length: 6 CEU Hours and Complete Re-Certification Training**
- **All Modules** 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

