Broker and Assistance Network Certification Program
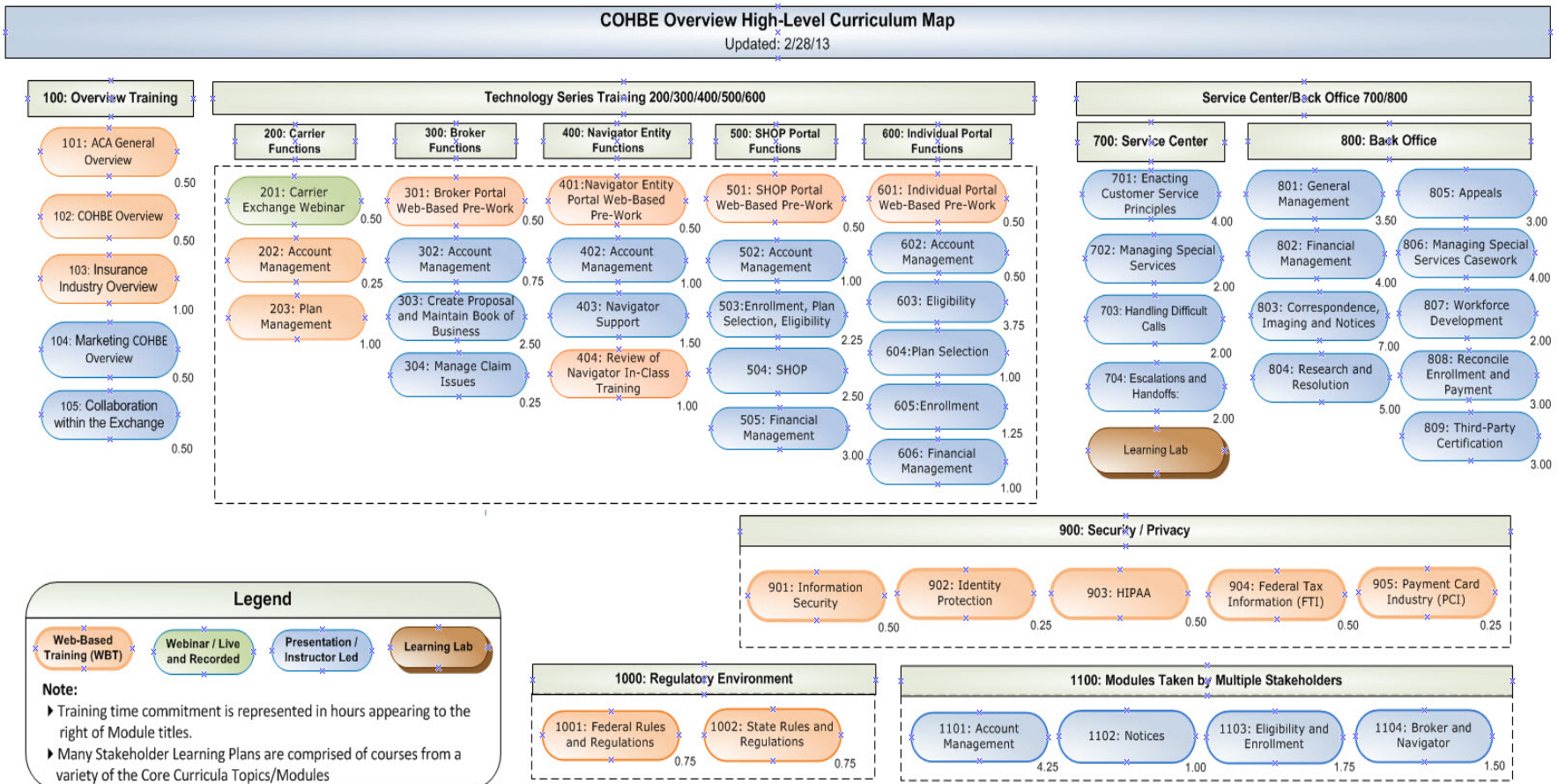
Connect for Health Colorado Board meeting
May 13, 2013

Exhibit 1.12 High-Level Curriculum Map

COHBE Overview High-Level Curriculum Map
Updated: 2/28/13

100: Overview Training

- 101: ACA General Overview — 0.50
- 102: COHBE Overview — 0.50
- 103: Insurance Industry Overview — 1.00
- 104: Marketing COHBE Overview — 0.50
- 105: Collaboration within the Exchange — 0.50

Technology Series Training 200/300/400/500/600

200: Carrier Functions
- 201: Carrier Exchange Webinar — 0.50
- 202: Account Management — 0.25
- 203: Plan Management — 1.00

300: Broker Functions
- 301: Broker Portal Web-Based Pre-Work — 0.50
- 302: Account Management — 0.75
- 303: Create Proposal and Maintain Book of Business — 2.50
- 304: Manage Claim Issues — 0.25

400: Navigator Entity Functions
- 401: Navigator Entity Portal Web-Based Pre-Work — 0.50
- 402: Account Management — 1.00
- 403: Navigator Support — 1.50
- 404: Review of Navigator In-Class Training — 1.00

500: SHOP Portal Functions
- 501: SHOP Portal Web-Based Pre-Work — 0.50
- 502: Account Management — 1.00
- 503: Enrollment, Plan Selection, Eligibility — 2.25
- 504: SHOP — 2.50
- 505: Financial Management — 3.00

600: Individual Portal Functions
- 601: Individual Portal Web-Based Pre-Work — 0.50
- 602: Account Management — 0.50
- 603: Eligibility — 3.75
- 604: Plan Selection — 1.00
- 605: Enrollment — 1.25
- 606: Financial Management — 1.00

Service Center/Back Office 700/800

700: Service Center
- 701: Enacting Customer Service Principles — 4.00
- 702: Managing Special Services — 2.00
- 703: Handling Difficult Calls — 2.00
- 704: Escalations and Handoffs: — 2.00
- Learning Lab

800: Back Office
- 801: General Management — 3.50
- 802: Financial Management — 4.00
- 803: Correspondence, Imaging and Notices — 7.00
- 804: Research and Resolution — 5.00
- 805: Appeals — 3.00
- 806: Managing Special Services Casework — 4.00
- 807: Workforce Development — 2.00
- 808: Reconcile Enrollment and Payment — 3.00
- 809: Third-Party Certification — 3.00

900: Security / Privacy
- 901: Information Security — 0.50
- 902: Identity Protection — 0.25
- 903: HIPAA — 0.50
- 904: Federal Tax Information (FTI) — 0.50
- 905: Payment Card Industry (PCI) — 0.25

1000: Regulatory Environment
- 1001: Federal Rules and Regulations — 0.75
- 1002: State Rules and Regulations — 0.75

1100: Modules Taken by Multiple Stakeholders
- 1101: Account Management — 4.25
- 1102: Notices — 1.00
- 1103: Eligibility and Enrollment — 1.75
- 1104: Broker and Navigator — 1.50

Legend
- Web-Based Training (WBT)
- Webinar / Live and Recorded
- Presentation / Instructor Led
- Learning Lab

Note:
- Training time commitment is represented in hours appearing to the right of Module titles.
- Many Stakeholder Learning Plans are comprised of courses from a variety of the Core Curricula Topics/Modules

CONNECT for HEALTH COLORADO

Series	Module #	Module Title	Course #	Course Title	Delivery Method	Duration	Development Start	Development End	Final approval	Ready to deliver
100	101	ACA General Overview		ACA General Overview	OL	0.50				
100	102	Connect for Health Colorado Overview		Connect for Health Colorado Overview	OL	0.50	02/18	03/04	03/11	03/15
100	103	Insurance Industry Overview		Insurance Industry Overview	OL	1.00				
100	104	Marketing Connect for Health Colorado		Effective Marketing of Connect for Health Colorado	ILT	0.50	04/02	04/09	04/16	04/17
100	105	Collaboration within the Exchange		Building Effective Exchange Partnerships	ILT	0.50				
200	201	Carrier Portal Web-Based Pre-Work		Carrier Portal Web-Based Pre-Work	WEBINAR	0.50				
200	202	Account Management		Create and Manage Carrier Account	OL	0.25	04/02	05/21	05/28	06/03
200	203	Plan Management		Certify Plan Internal Training (SE 1 Hour)	OL	1.00				
300	301	Broker Portal Web-Based Pre-Work		Broker Portal Web-Based Pre-Work	OL	0.50	02/20	02/26	03/05	03/08
300	302	Account Management	1	Create Broker Account	ILT	0.25				
300	302	Account Management	2	Manage Broker Information	ILT	0.50				
300	303	Create Proposal and Maintain Book of Business	1	Create Proposal and/or Census	ILT	1.25	05/01	05/31	06/07	06/10
300	303	Create Proposal and Maintain Book of Business	2	Maintain Book of Business	ILT	1.25				
300	304	Manage Claim Issues		Manage Claim Issues	ILT	0.25				
400	401	Navigator Entity Portal Web-Based Pre-Work		Navigator Entity Portal Web-Based Pre-Work	OL	0.50	02/26	03/11	03/18	03/20

CONNECT for HEALTH COLORADO

Series	Module #	Module Title	Course #	Course Title	Delivery Method	Duration	Development		Final approval	Ready to deliver
							Start	End		
400	402	Account Management	1	Create Navigator Entity/Navigator Account	ILT	0.50				
400	402	Account Management	2	Manage Navigator Entity/Navigator Information	ILT	0.50	04/08	05/02	05/09	05/10
400	403	Navigator		Navigator Support	ILT	1.50				
400	404	Review of Navigator In-Class Training		Review of Navigator In-Class Training	OL	1.00				
500	501	SHOP Portal Web-Based Pre-Work		SHOP Portal Web-Based Pre-Work	OL	0.50	03/05	03/21	03/28	04/02
500	502	Account Management	1	Create Employer Account	ILT	0.50				
500	502	Account Management	2	Manage Employer Information	ILT	0.50				
500	503	Enrollment, Plan Selection, Eligibility	1	Participate in SHOP Enrollment Period	ILT	0.50	04/22	05/20	05/27	05/28
500	503	Enrollment, Plan Selection, Eligibility	2	Shop for Employer Plan	ILT	0.75				
500	503	Enrollment, Plan Selection, Eligibility	3	Submit SHOP Application	ILT	1.00				
500	504	SHOP	1	Determine Employer Eligibility	ILT	0.50				
500	504	SHOP	2	Maintain Employer Branding	ILT	0.25				
500	504	SHOP	3	Manage Employee Roster	ILT	0.50				
500	504	SHOP	4	Select Plans and Determine Contribution	ILT	0.75	05/20	06/10	06/17	06/18
500	504	SHOP	5	Appeal Employee Advanced Premium Tax Credit (APTC)	ILT	0.25				
500	504	SHOP	6	Appeal Employer Eligibility	ILT	0.25				

CONNECT for HEALTH COLORADO

Series	Module #	Module Title	Course #	Course Title	Delivery Method	Duration	Development		Final approval	Ready to deliver
							Start	End		
500	505	Financial Management	1	Provide Payment	ILT	1.50	06/10	07/03	07/11	07/12
500	505	Financial Management	2	Delinquent Payments	ILT	1.50				
600	601	Individual Portal Web-Based Pre-Work		Individual Portal Web-Based Pre-Work	OL	0.50	03/20	04/03	04/10	04/15
600	602	Account Management	1	Create Individual Account	ILT	0.25	03/05	04/01	04/08	04/09
600	602	Account Management	2	Manage Individual Information	ILT	0.25				
600	603	Eligibility	1	Anonymous Eligibility Assessment	ILT	0.50				
600	603	Eligibility	2	Provide Household Information	ILT	0.50				
600	603	Eligibility	3	Determine Individual Eligibility	ILT	2.00				
600	603	Eligibility	4	Appeal Exchange Subsidy	ILT	0.50				
600	603	Eligibility	5	Apply for Exemption	ILT	0.25				
600	604	Plan Selection	1	Anonymous Shopping	ILT	0.50	04/01	04/26	05/03	05/06
600	604	Plan Selection	2	Shop for Individual Plan	ILT	0.50				
600	605	Enrollment	1	Participate in Enrollment Period	ILT	0.50				
600	605	Enrollment	2	Submit Individual Application	ILT	0.50				
600	605	Enrollment	3	Enroll Native American	ILT	0.25				
600	606	Financial Management		Carrier Fee Billing	ILT	1.00				
700	701	Enacting Customer Service Principles		Enacting Customer Service Principles	ILT	4.00	08/05	09/12	09/19	09/20
700	702	Managing Special Services		Managing Special Services	ILT	2.00				
700	703	Handling Difficult Calls		Handling Difficult Calls	ILT	2.00				
700	704	Escalations and Handoffs		Escalations and Handoffs	ILT	2.00				
700		Learning Lab		Learning Lab	LL		n/a	n/a	n/a	n/a
800	801	General Management		General Management	ILT	3.50	04/26	05/29	06/05	06/06
800	802	Financial Management		Financial Management	ILT	4.00				

CONNECT for HEALTH COLORADO

Series	Module #	Module Title	Course #	Course Title	Delivery Method	Duration	Development		Final approval	Ready to deliver
							Start	End		
800	803	Correspondence, Imaging, and Notices	1	Process Offline Correspondence	ILT	1.50				
800	803	Correspondence, Imaging, and Notices	2	Imaging and Indexing	ILT	2.00				
800	803	Correspondence, Imaging, and Notices	3	Process Outbound Correspondence	ILT	2.00	05/22	07/23	07/30	07/31
800	803	Correspondence, Imaging, and Notices	4	Create Back Office/Service Representative/Connect for Health Colorado/DOI Account	ILT	1.00				
800	803	Correspondence, Imaging, and Notices	5	Post Messages to Navigators	ILT	0.50				
800	804	Research and Resolution		Research and Resolution	ILT	5.00				
800	805	Appeals		Appeals	ILT	3.00	05/31	08/12	08/19	08/20
800	806	Managing Special Services Casework		Managing Special Services Casework	ILT	4.00				
800	807	Workforce Development		Workforce Development	ILT	2.00				
800	808	Reconcile Enrollment and Payment		Reconcile Enrollment and Payment SHOP and Individual	ILT	3.00	07/10	09/04	09/11	09/12
800	809	Third Party Cerification	1	Third Party Certification/Broker	ILT	1.50				
800	809	Third Party Cerification	2	Third Party Certification/Navigator	ILT	1.50				
900	901	Information Security		Security Awareness 1, 2, 3	OL	0.50				
900	902	Identity Protection		Personally Identifiable Information (PII)	OL	0.25				
900	903	HIPAA		Protected Health Information (PHI)	OL	0.50	02/20	03/21	03/28	03/26
900	904	Federal Tax Information (FTI)		FTI Security and Protection	OL	0.50				
900	905	Payment Card Industry (PCI)		Payment Card Industry Data Security	OL	0.25				

CONNECT for HEALTH COLORADO

Series	Module #	Module Title	Course #	Course Title	Delivery Method	Duration	Development		Final approval	Ready to deliver
							Start	End		
1000	1001	Federal Rules and Regulations	1	HHS Rules and Regulations - Overview	ILT	0.25	02/20	03/12	03/19	03/20
1000	1001	Federal Rules and Regulations	2	HHS Rules and Regulations Specifics and Process	ILT	0.25				
1000	1001	Federal Rules and Regulations	3	IRS Rules and Regulations - Overview	ILT	0.25				
1000	1002	State Rules and Regulations	1	Connect for Health Colorado Policies - Overview	ILT	0.25				
1000	1002	State Rules and Regulations	2	Colorado Department of Health Care Policy and Financing Rules and Regulations - Overview	ILT	0.25				
1000	1002	State Rules and Regulations	3	Division of Insurance Rules and Regulations - Overview	ILT	0.25				
1100	1101	Account Management	1	Manage Login	ILT	1.00	02/20	04/15	04/22	04/23
1100	1101	Account Management	2	Manage Password	ILT	1.00				
1100	1101	Account Management	3	Provide Feedback	ILT	0.75				
1100	1101	Account Management	4	Provide Assistance to Customers	ILT	1.00				
1100	1101	Account Management	5	Manage Back Office/Service Representative/Connect for Health Colorado/DOI Account	ILT	0.50				
1100	1102	Notices	1	Process Offline Correspondence	ILT	0.50	03/14	04/25	05/02	05/03
1100	1102	Notices	2	Process Outbound Correspondence	ILT	0.50				
1100	1103	Eligibility and Enrollment	1	Report Life Change Event	ILT	1.00				
1100	1103	Eligibility and Enrollment	2	Disenroll from Plan	ILT	0.75				
1100	1104	Broker and Navigator	1	Select Broker	ILT	0.50				
1100	1104	Broker and Navigator	2	Select Navigator Entity	ILT	1.00				

CONNECT for HEALTH COLORADO

Create Account - Employer

The **Create Account - Employer** screen is where required information is entered about the employers business. Click each red button to learn more.

PROPERTIES
Allow user to leave interaction: After viewing all the steps
Show 'Next Slide' Button: Show upon completion
Completion Button Label: Next Slide

Properties...

Edit in Engage

Account Management Basic Features

Basic features of **Account Management** include creating an account and managing employer information through My Account.

Next, let's look at **Eligibility**.

Connect for Health Colorado Certification Process Timeline

June 15th
Invitation to
Register

June 15th
Begin LMS
Registration

August 1st
Classes Begin

August 1st - November 1st
Attend Scheduled Classes

October 1st

Certified Personnel
May Begin
Enrollments

CONNECT for HEALTH COLORADO

Broker Certification Process

- Registration

- Carrier Notification

- Schedule Training - self service

- Carrier Challenges - remove challenged brokers from scheduling queue

- Online Pre-work

- Attend Classroom Sessions

- Contracting and Certification

CONNECT *for* **HEALTH** COLORADO

Health Coverage Guide Certification

- Assistance Sites hire Health Coverage Guides
- Assistance Sites checks privacy & security, background check, conflict of interest disclosures, and exclusion list
- Training completed with COHBE trainers with passing grade
- Ongoing and updated training

CONNECT *for* **HEALTH**
COLORADO

Broker Review Process

- Carriers receive listings of all Brokers seeking certification

- Carriers have 7 days to challenge an appointment

- Carrier challenges will be referred to Review Committee

- Review Committee or a contracted Mediation Specialist will confidentially review the reason(s) for and circumstances surrounding the carrier challenge

- A binding determination will be made

CONNECT *for* **HEALTH** COLORADO

Broker Review Process

Elements under development:

- Development of Review Committee/Mediator

- Process for notification to broker of a challenge

- Steps in and documentation of the Review Process

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