

# Certification Program Overview

## 2023-24 Assistance Network

### Referral Specialist



#### OBJECTIVE

Referral Specialists work or volunteer for a Referral Partner Organization that is part of the Assistance Network. The Referral Specialist facilitates Health Insurance enrollment referrals while providing education on health care and financial assistance, including Connect for Health Marketplace and premium/cost sharing reductions; Colorado Connect and SilverEnhanced Savings; and Health First Colorado/CHP+. Referral Specialists do not assist with eligibility or enrollment applications but rather refer to Certified Assisters and/or Brokers for support with this process. The certification program consists of 35 online classes and six required agreements. Referral specialists will be able to print the required documents, but they must be signed electronically for certification.

#### REQUIREMENTS FOR CERTIFICATION

The following are **required** for certification:



You must work or volunteer for a Referral Partner Organization that is a contracted partner



Completion of a background check with a contracted partner



Completion of the Connect for Health Colorado online certification coursework



Attestation of Required Documents



Recertification is required at least annually. Decertification may occur if you violate any of the terms and conditions as explained in our Conflict of Interest and Conduct Policy.

## HOW TO GET CERTIFIED IN 4 STEPS



1

Create or log in to your [C4U](#) account



2

Complete all assigned online courses/quizzes in [C4U](#)



3

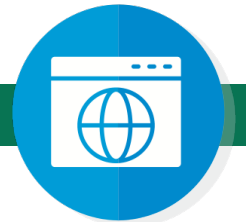
Electronically sign the required agreement in [C4U](#)



4

Access and download [certificate of completion](#)

## HOW TO LOG INTO THE C4U



1. Go to <https://c4hco.csod.com/>
2. Login with your credentials if you are a returning user or if new, select [Create a new account](#)
  - Follow the instructions found at the top of the form carefully
  - If you are unsure on your Position/Role, be sure to check “Explanation of Position or Roles” document

3. Next, you will define a security question before being logged into the C4U



**If you are new to C4U**, please be sure to select the “[New? Start here](#)” button found on the Welcome screen to learn how to navigate our portal



**To learn more about the Referral Specialist Certification Program** and how to complete the program, check the “[Certification Programs](#)” page



Once you are registered and logged in, the appropriate curriculum can be found on your [Transcript](#). If you do not see your coursework or if you are assigned incorrect coursework, send an email to [TrainingSupport@c4hco.com](mailto:TrainingSupport@c4hco.com) requesting the appropriate curriculum (during business hours, Monday-Friday 9:00 AM-5:00 PM MST). Any requests after business hours will be processed no later than the beginning of the following business day.

## REQUIRED ONLINE CLASSES



The **Assistance Network Referral Specialist Certification** training is about **9** training hours



The **course description** for each training can be found on our [website](#) and in [C4U](#)

## REQUIRED DOCUMENTS



- Referral Specialist Conduct Policy (*Read Only*)
- Referral Specialist Conduct Attestation (*E-signature Required*)
- Referral Specialist Certification Requirements (*Read Only*)
- Referral Specialist Security Statement (*Read Only*)
- Referral Specialist Duties (*Read Only*)
- Referral Specialist Background Check Attestation (*E-signature Required*)

The documents requiring your **electronic signature** will be in the [C4U](#). You will have the option to view and save the documents for your records. Please submit a copy of these documents with your electronic signature to your agency's designated C4HCO Program Manager to be kept on file. If you have any questions regarding the terms and conditions of these documents, please contact the Assistance Network at [AssistanceNetwork@c4hco.com](mailto:AssistanceNetwork@c4hco.com).

1. Select the **“Launch”** button next to the document
  - The document will open in a new browser window where you can view and download the document for your records
  - You can relaunch the document at any time even after electronically signing it
2. Return to the C4U and select the **“Mark Complete”** button, which replaced the **“Launch”** button from before
3. Select the **“Sign”** button, which replaced the **“Mark Complete”** button
4. Scroll to the bottom and select the **“Sign”** button found next to your electronic signature

Connect for Health Colorado E-Signature Policy (Test)

**Training Details**

Training Type: Required E-Signature  
Provider: Connect for Health Colorado  
Version: 1.0  
Training Hours: 0 Hours 0 Minutes  
Description:  
Status: Pending Completion Signature  
Training Purpose:  
Due Date: None

**Assignment and Version History**

**Electronic Signature**

I have read, understood, and agree to all of the terms and conditions of this document. This confirmation constitutes an electronic signature.

Snorlax Weasley

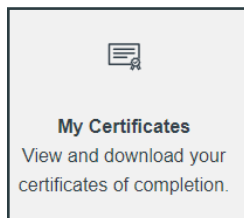
## NEXT STEPS



Once you have completed your certification, you can download your certificate of completion from [C4U](#).

### How to download your certificate:

1. Select the “[My Certificates](#)” icon on the Welcome page



2. Select the “**View Certificate**” button next to the completed curricula to download the certificate

Once you have completed your certification, you will need to contact your Program Manager for additional learning opportunities and to review the below checklist.

### ASSISTER CONTINUING EDUCATION CHECKLIST

This checklist includes the resources certified Assisters should use to maintain their expertise. Please confirm with your Program Manager how to engage with the following resources. If you are a one-person shop, please reach out to [AssistanceNetwork@c4hco.com](mailto:AssistanceNetwork@c4hco.com) with any questions.

- Program Updates calls
- Alerts from Assistance Network
- Ad hoc webinars from Assistance Network Team or other Connect for Health Colorado Teams
- Fall training opportunity, currently called CoverCO Conference
- Resources in [C4U](#) and Box
- Specialized Team training opportunities (i.e., application walkthrough, plan distinction, event coordination/preparation, etc.)