TODAY'S OPTIONS®

Today's Options Certification Details

Yes	Online Certification Required?	Notes: Todays Options requires agents to certify online each year.
No	Face to Face Certification Required?	Notes: Todays Options does not require a face to face certification
Yes	AHIP or Gorman Required?	Notes: Todays Options does not require AHIP, but their certification is offered through Gorman. This certification is offered to agents at no cost.
Yes	AHIP or Gorman Accepted for Some Modules?	Notes: Completion of AHIP satisfies some of the requirements for Gorman's General Medicare certification.
No	Reimburses the Cost for AHIP?	Notes: Todays Options will not reimburse for AHIP, but they also do not charge for their Gorman certification.

IMPORTANT PHONE NUMBERS

866-649-4423	***Todays Options Agent Support Line***
888-568-0270	***Todays Options Certification Support Line***

CERTIFICATION LINK

http://www.uamcertification.com/

Your Questions Answered!

2013 Medicare Advantage Training & Certification Program

1. What is Universal American's (UAM's) 2013 Medicare Advantage (MA) training and certification requirement?

To be certified for the 2013 MA enrollment year, agents must successfully complete the following UAM online training and certification programs. REMINDER: agents are required to certify in order to represent UAM's 2013 MA plans and receive corresponding compensation.

- Medicare Training & Certification (CORE)
- Compliance, Products, and Procedures (CPP) training and certification. The CPP section includes:
  - UAM-specific product training (HMO, PPO, PFFS, Network PFFS).
  - The products section includes an introduction, enrollment and Scope of Appointment training.

Note that in addition to the Compliance and Procedures training and testing, agents are required to complete product training for each UAM product they intend to represent.

2. Before I begin my training, are there any prerequisites?

Yes. Prior to beginning CORE training, agents must complete their online contracting and prerequisite requirements. For more information, see question #7.

3. Is there a cost for completing my online training?

There's no user fee or charge to UAM's contracted agents – this is a savings of up to $100 over the cost of comparable training programs.

4. When can I access the online training programs?

The CORE training and certification program and UAM's CPP training module may be accessed beginning August 1, 2012 (date may change).

5. Where can I access the online training programs?

The CORE and CPP training and certification programs can be accessed at the following address: www.UAMCertification.com.

6. How do I begin?

Before beginning your training, we strongly encourage you to review the user guide that is available on the site for download and printing (locate the guide at www.UAMCertification.com). The user guide contains helpful screen shots, and provides detailed information about the pop up blocker, audio requirements, user name, and more.

New users will need to register by following these important steps:

- Visit www.UAMCertification.com
- Enter your National Producer Number (NPN)
- Complete all required fields
- Create your password

After your initial visit, you may access the site by entering your Social Security Number (SSN). Or, if you are contracting for an agency, you may enter the agency's Federal Employer Identification Number (FEIN) and your login password.

7. What are UAM's contracting requirements and other prerequisites?

UAM's contract and prerequisite requirements include:

- UAM Medicare Advantage Contract
- Annual Background Check – to be completed by UAM's home office
- UAM Health Insurance Portability and Accountability Act (HIPAA) Attestation (including HIPAA training, privacy, and security)
- UAM Code of Conduct Attestation
- UAM Dual Low Income Beneficiary Training and Exam
- UAM Fraud, Waste, and Abuse (FWA) Training and Exam

8. What is covered under the CORE training and certification program?

This program covers Medicare basics, Medicare products, and corresponding regulatory requirements with a focus on Medicare Marketing Guidelines.

9. What is covered under the CPP training and certification program?

This program covers UAM corporate policies and procedures, and UAM products and services. UAM's MA products include:

- Health Maintenance Organization plans (HMO)
- Preferred Provider Organization plans (PPO)
- Private Fee-for-Service plans (PFFS)
- Network Private Fee-for-Service plans (Network PFFS)

In order to begin the CPP training, agents must first successfully complete the CORE certification. To become certified, agents must successfully complete and pass at least one CPP exam in addition to satisfying the other training/certification requirements.

10. Does each training program conclude with an exam?

Yes, the CORE and CPP programs each conclude with an exam. Exams are also included in the prerequisites section, including the Dual Low Income Beneficiary training and exam, and the Fraud, Waste, and Abuse (FWA) training and exam. All exams must be successfully passed in order to represent UAM's 2013 Medicare Advantage products.

As a reminder, agents must complete all requirements in the prerequisites section, including the HIPAA and Code of Conduct attestations.

11. May I complete only one CPP training module?

Yes, once you have satisfied the "Corporate" and "Procedures" sections of CPP training, you may then complete the training module for the product that you are contracted and appointed to offer through Universal American (whether HMO, PPO, or PFFS plans).

If you are contracted and appointed to offer more than one UAM product, you should complete the product training for each product available in your market. By certifying for all products available in a given market, you will be able to offer your clients the UAM plan that best suits their needs.

12. May I take the CORE and CPP training programs on different days?

Yes, you may take the training on different days and at different times.

Remember that you must successfully complete CORE training and certification before you may begin your CPP training.

13. Should I expect to take only one certification exam?

No, there is more than one exam. Agents will be asked to complete an exam following the completion of their CORE and CPP training modules

14. How many questions are on the exams?

The CORE certification exam contains 50 questions. The CPP certification exams contain 20-25 questions each.

15. How long will it take to complete training and certification?

Typically, it will take about four to five hours to complete CORE and CPP training, but completion time may vary from user to user. There is no time limit on completing the certification exams. Please allow adequate time to complete your training and certification and try not to rush, as annual certification is intended to help strengthen your knowledge and understanding of the subject matter.

16. Can the training be paused if I need to step away?

Yes, the modules can be manually placed on pause, however we recommend that you do not pause an exam once it has been started.

17. What score is needed to pass the exams?

In accordance with CMS requirements, the exams must each be passed with a grade of 85% or higher.

18. How many attempts are given to pass the exams?

Agents are given two (2) attempts in which to pass each certification exam.

19. How many exams must be passed in order to be certified?

Agents must pass the CORE exam and at least one CPP exam in order to be certified. Agents who do not meet this requirement will not be able to represent UAM's 2013 MA plans.

20. If I take the exams more than once, will the questions differ?

Yes, the questions will differ because there are different versions of each exam. Questions are also shuffled and will not appear in the same order.

21. By what date must I complete my certification requirement?

We strongly recommend completing your 2013 certification by October 1, 2012. Remember that you may not accept 2013 MA enrollments unless you have successfully completed your 2013 MA training and certification requirement.

22. What if I don't pass an exam?

Agents who do not pass the CORE exam and at least one CPP exam will not be able to represent UAM's 2013 MA products. It is also important to note that agents who do not attest or pass the Dual Low Income Beneficiary training and exam will not be able represent Universal American's 2013 Medicare Advantage products.

23. May I visit UAM University to complete my 2013 training and certification requirement?

No. UAM University does not offer the 2013 training and certification program. To complete your 2013 certification, you must visit our 2013 training and certification site at www.UAMCertification.com. If you are visiting UAM University, you may link to our training and certification site from the home page.

24. Will the online training program pause or "time out" if I step away?

Yes, the training website will pause or "time out" after 20 minutes of inactivity. To resume your training you will need to log back in and select the module/lesson you were previously reviewing. You will be returned to the point at which you had left off.

Warning: once a final exam is started, **it must be completed in the same session**. If the session pauses or "times out," it will count as an attempt.

Remember: you have only two attempts in which to successfully pass the certification exams.

25. What is the "Medicare Sales Sentinel"?

As in previous years, our online training programs are powered by our training partner, Gorman Health Group. Medicare Sales Sentinel is the name of the online training and certification platform hosted by the Gorman Health Group.

26. What if I need technical support?

Should you need assistance in using the program, call 888-568-0270 for technical support. Hours of operation are as follows: Monday-Friday, 8:00 a.m. – 7:00 p.m. Eastern time. Technical support is also available on weekends through November between the hours of 10:00 a.m. – 2:00 p.m. Eastern Time.

You may also contact technical support by e-mail as follows: uamsalescert@gormanhealthgroup.com. E-mails will be answered within 24 hours or on the next business day.

27. Is a user guide available?

Yes, as noted in question #6, a user guide is available for downloading and printing on the training and certification site (www.UAMCertification.com). The user guide contains important instructions related to using the training tool, and includes helpful screenshots. We strongly encourage agents to review this guide before beginning their training.

28. Who can I contact for additional support?

Should you have other questions or need more support, please call Agent Services as follows: 1-866-649-4423, Monday-Thursday, 8:00 a.m.-6:00 p.m. Eastern Time, Friday 8:00 a.m.-4:00 p.m. Eastern Time. Or, contact your Sales Support Team.

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A Healthy Collaboration®

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2013 AGENT CERTIFICATION MEDICARE SALES SENTINEL

User Manual

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WWW.UAMCERTIFICATION.COM

•Agents will begin their 2013 Medicare Advantage training and certification at www.uamcertification.com

(Medicare Sales Sentinel).

•To begin the Contracting and Certification Process agents will click the Complete your Contract and/or Certification Here button.

•The agent will then be directed to Medicare Sales Sentinel.

•We encourage agents to retain this web address or save it to their favorites. This site will allow agents to return to the Medicare Sales Sentinel site to complete their Universal American Certification. Agents will also have the ability to check the status of his/her certification process by clicking on ***Check your Contracting & Certification Status Here***.

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Contracting and Certification Requirements

Perquisite	Description
Program Overview Acknowledgement	Introduction and list of required program steps.
2013 Agent Contract	Revised 2013 UAM Agent Contract
Background Check	Criminal and OIG/GSA background check
2013 HIPAA Attestation	Read and attest to the 2013 HIPAA guidelines
2013 Code of Conduct Attestation	Code of Conduct review and agree
Training Integrity Attestation	Read and attest
2013 Compliance Fraud, Waste & Abuse Training and Exam	Review the material and pass the exam with a 85% or higher
2013 Dual Eligible Training and Exam	Review the material and pass the exam with a 85% or higher
2013 Core Certification Training and Exam	Must complete Gorman or AHIP Certification
2013 UAM Product Certification	Must complete each contracted product with a score of 85% or higher

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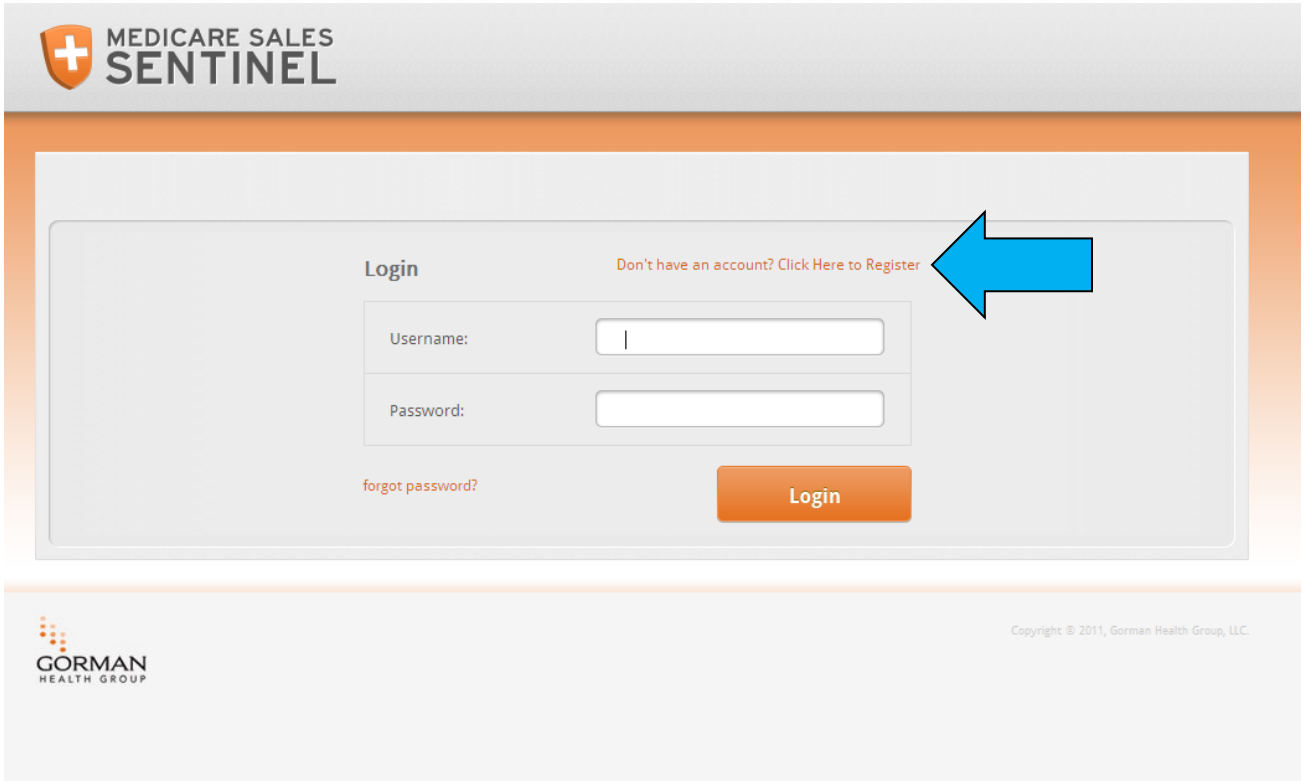
LOGIN

Medicare Sales Sentinel

- First time users will need to register for an account by clicking "**Don't have an account? Click here to Register.**"
- Returning users will need to login by entering their username and self-created Password.
- Once registered, you can retrieve a forgotten password or user name by clicking **"Forgot username?" or "Forgot password?"**



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REGISTRATION

Individual or Firm?

- After selecting "**Register**," the first screen will ask if you are registering as an individual or a firm.
- You will need to select "**Individual**" or "**Firm**." This is done by clicking the circle next to the applicable selection.
- If registering as an individual, you will be asked to enter your Social Security Number.
- If Registering as a Firm, you will be asked to enter your FEIN.

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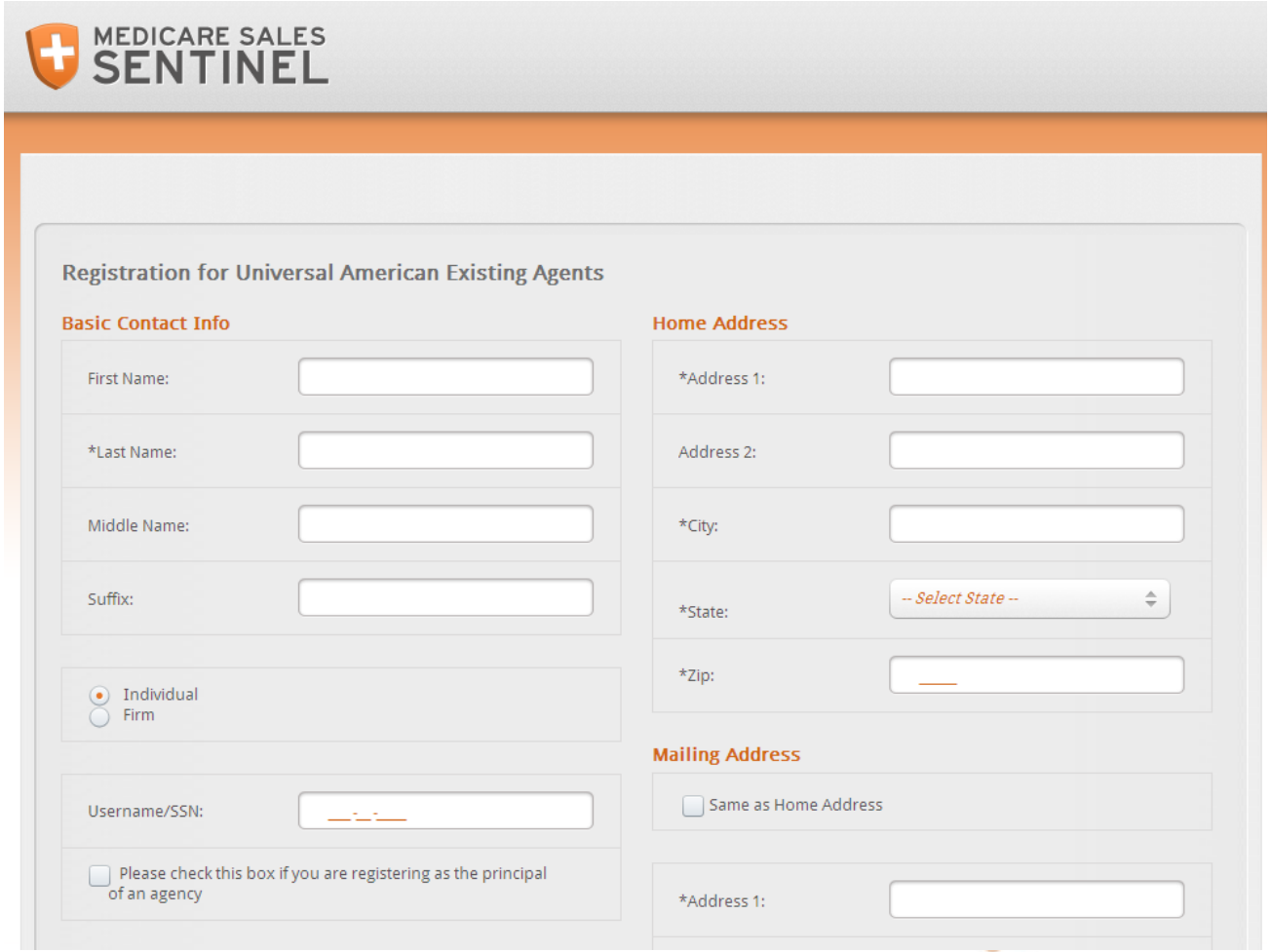
REGISTRATION

Medicare Sales Sentinel

- First time users will need to complete the required fields. Required fields are indicated with an asterisk.
- If you selected to register as an individual, you will need to enter your first and last name.
- If you selected to register as a firm, you will be asked to enter your agency or corporation name.
- Agents will use their Social Security Number and firms will use their FEIN as their username, which will already be populated with the information you entered on the previous screen.



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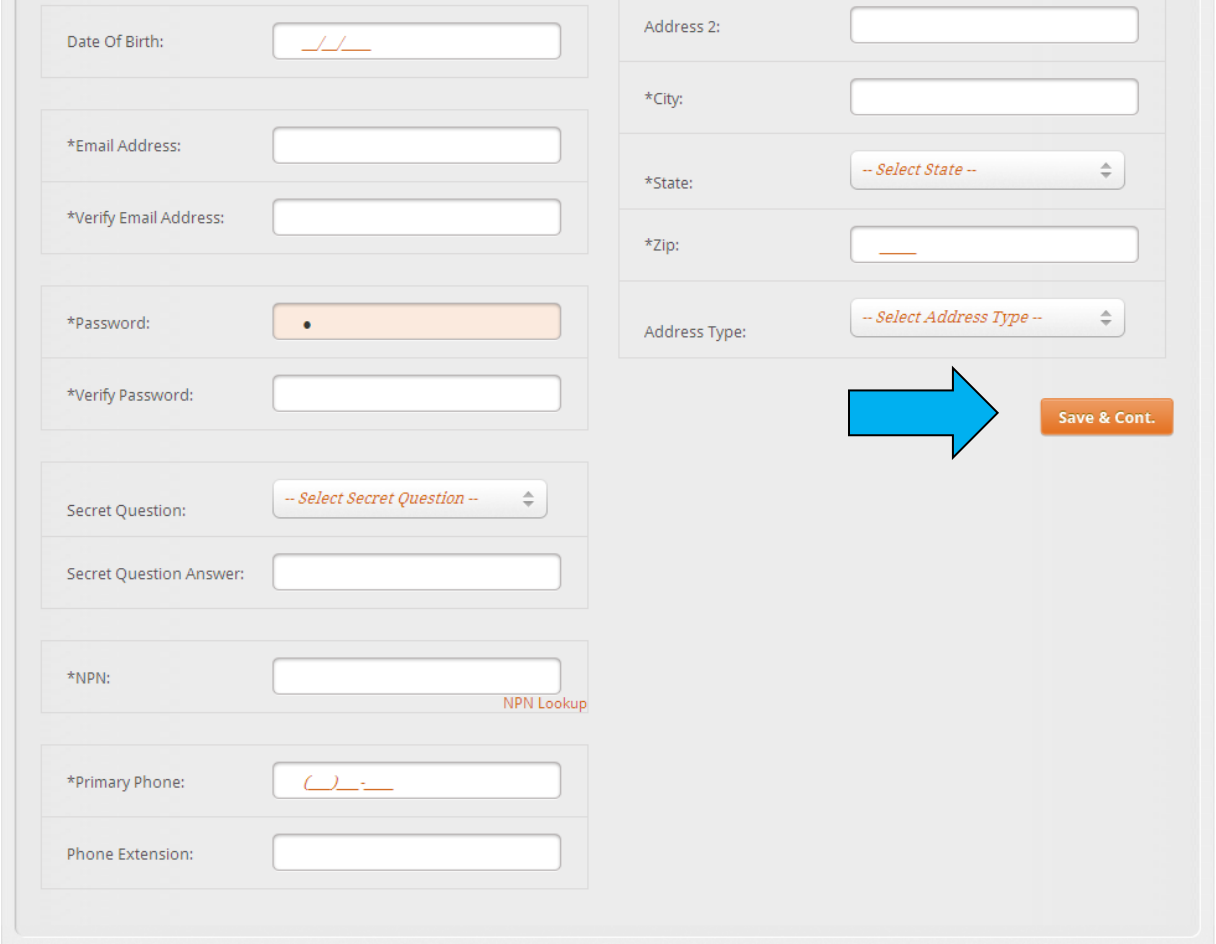
REGISTRATION CONT'D

Medicare Sales Sentinel

- Passwords will be created by the user and require the following:
  - Must be at least 8 characters long and contain at least:
    - 1 uppercase letter;
    - 1 lowercase letter;
    - 1 number; and
    - 1 special character.
- Once the registration is complete you will click "**Save and Continue**" to proceed to the next step.



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Introduction

- The first step in the certification process will be the Introduction screen.
- This screen will give you an overview of the program and its requirements.
- You will need to click "**Save and Continue**" to proceed.

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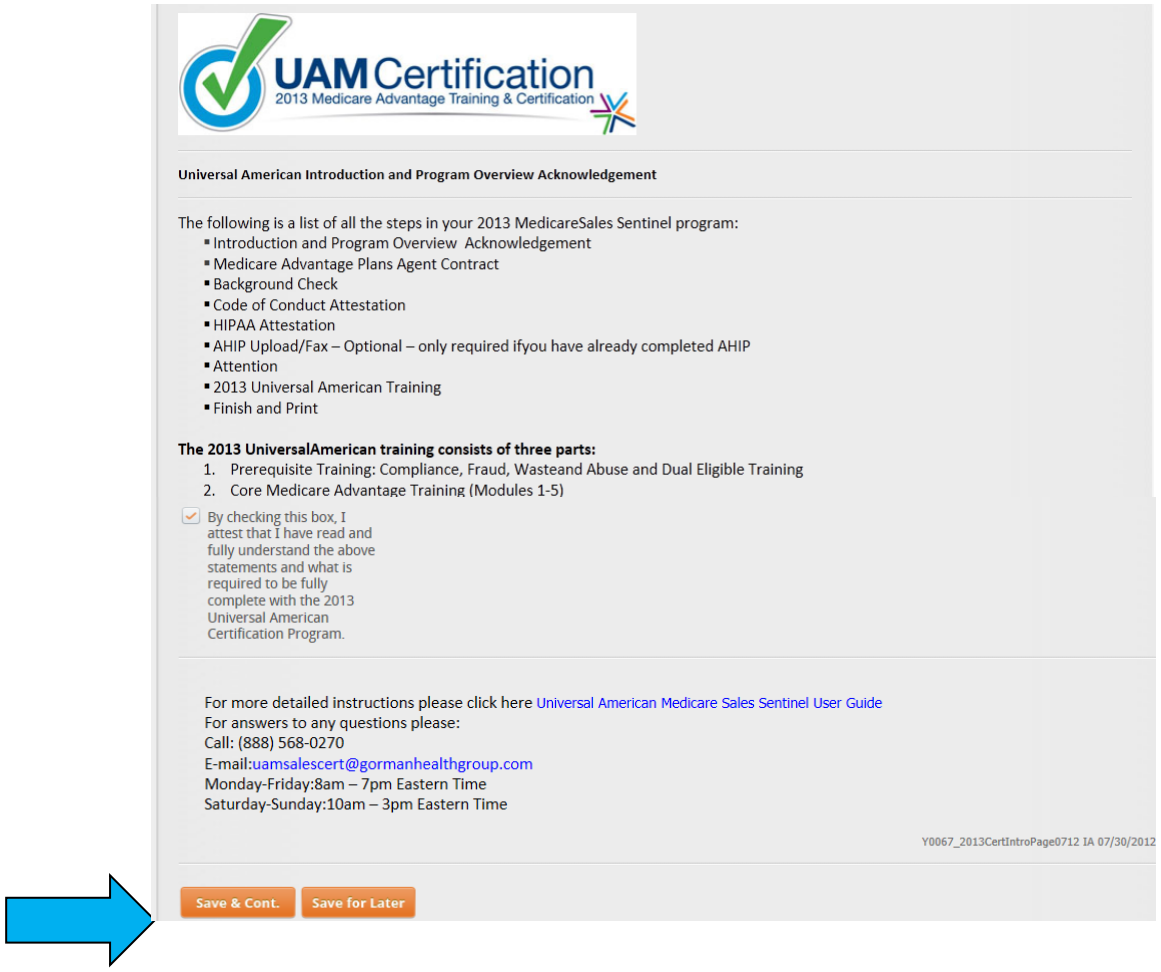

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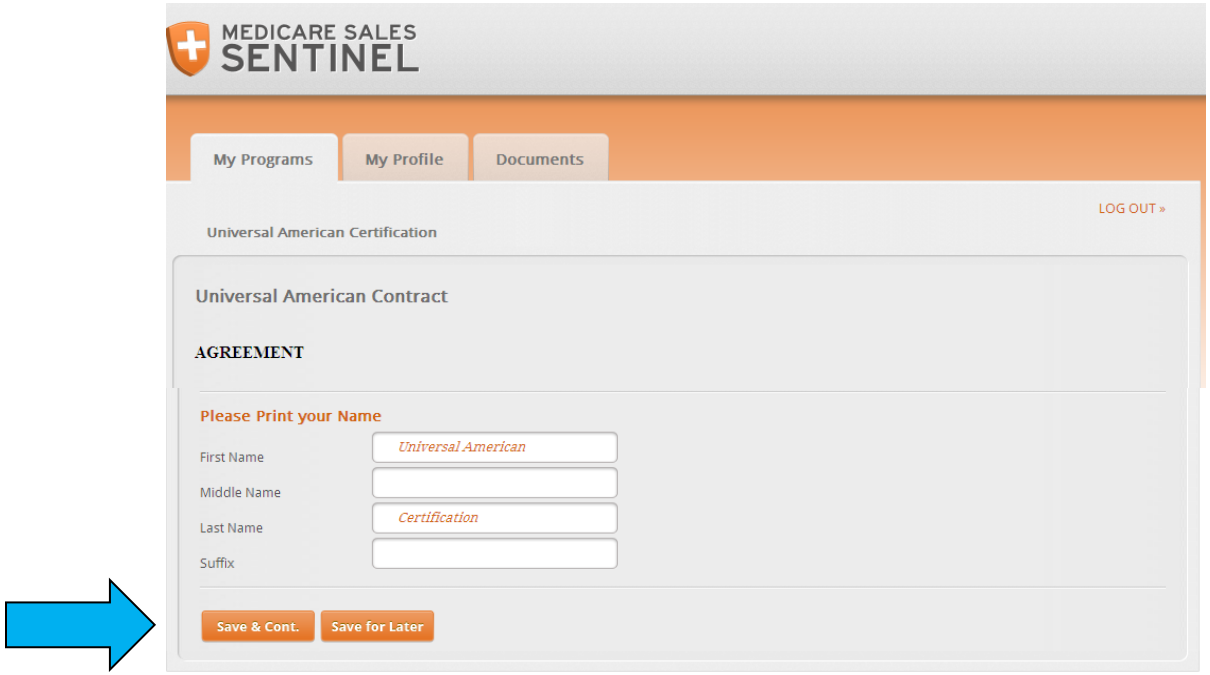
Contract (Existing Agents Only)

- Existing Agents will be required to complete the Universal American Contract.
- This contract will automatically authorize a background check for all states except Georgia and Mississippi.
- The agent will need to enter his/her name to complete the electronic signature of the contract.
- Click "**Save and Continue**" to Proceed to the next step.
- **New Agents will <u>not</u> be required to complete this step.**



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Code of Conduct Attestation

- All agents will need to review this page and click in the box to acknowledge understanding of the Code of Conduct Attestation.
- You will need to click "**Save and Continue**" to proceed.

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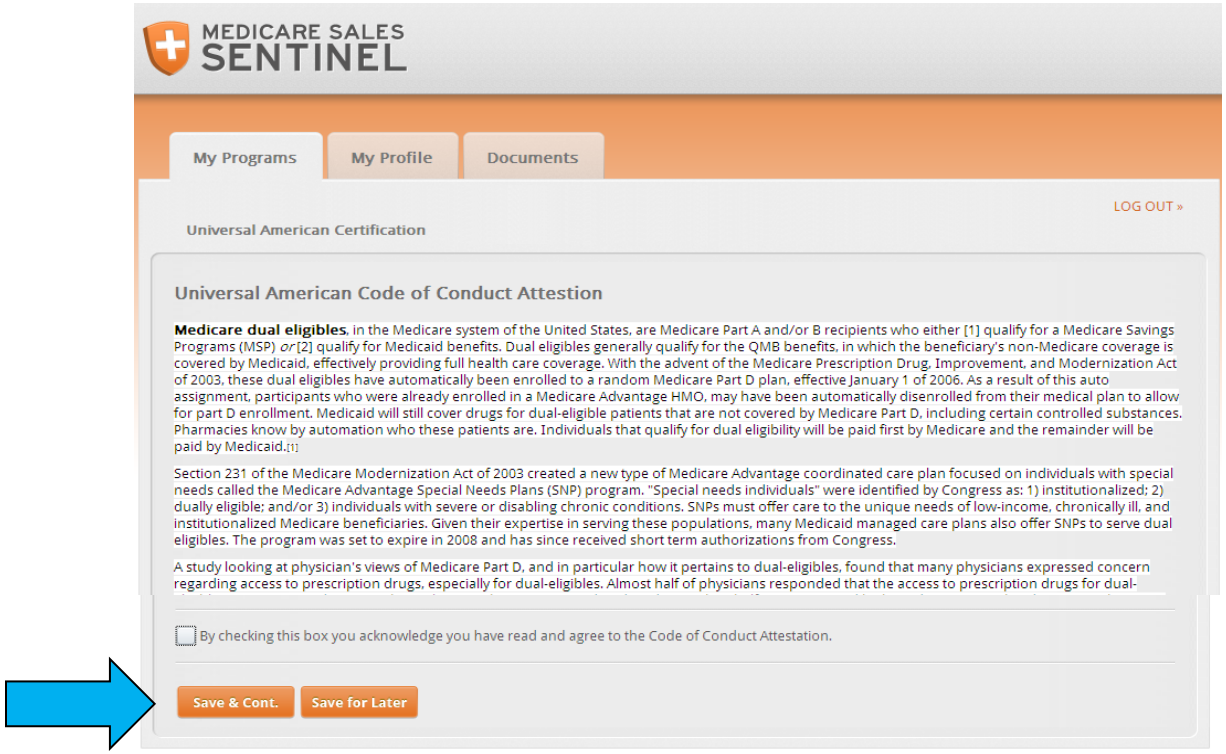

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Universal American HIPAA Attestation

- All agents will need to review the HIPAA Attestation page and click in the box to acknowledge understanding with the HIPAA Attestation.
- You will need to click "**Save and Continue**" to proceed.

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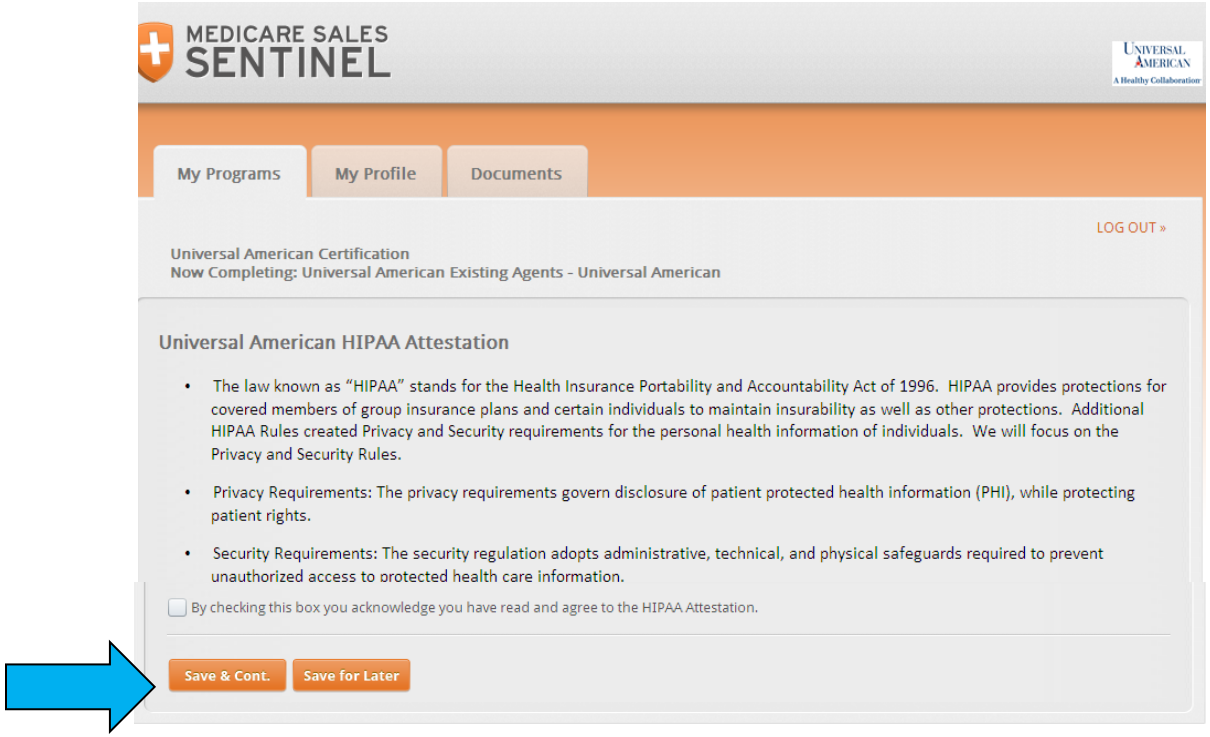

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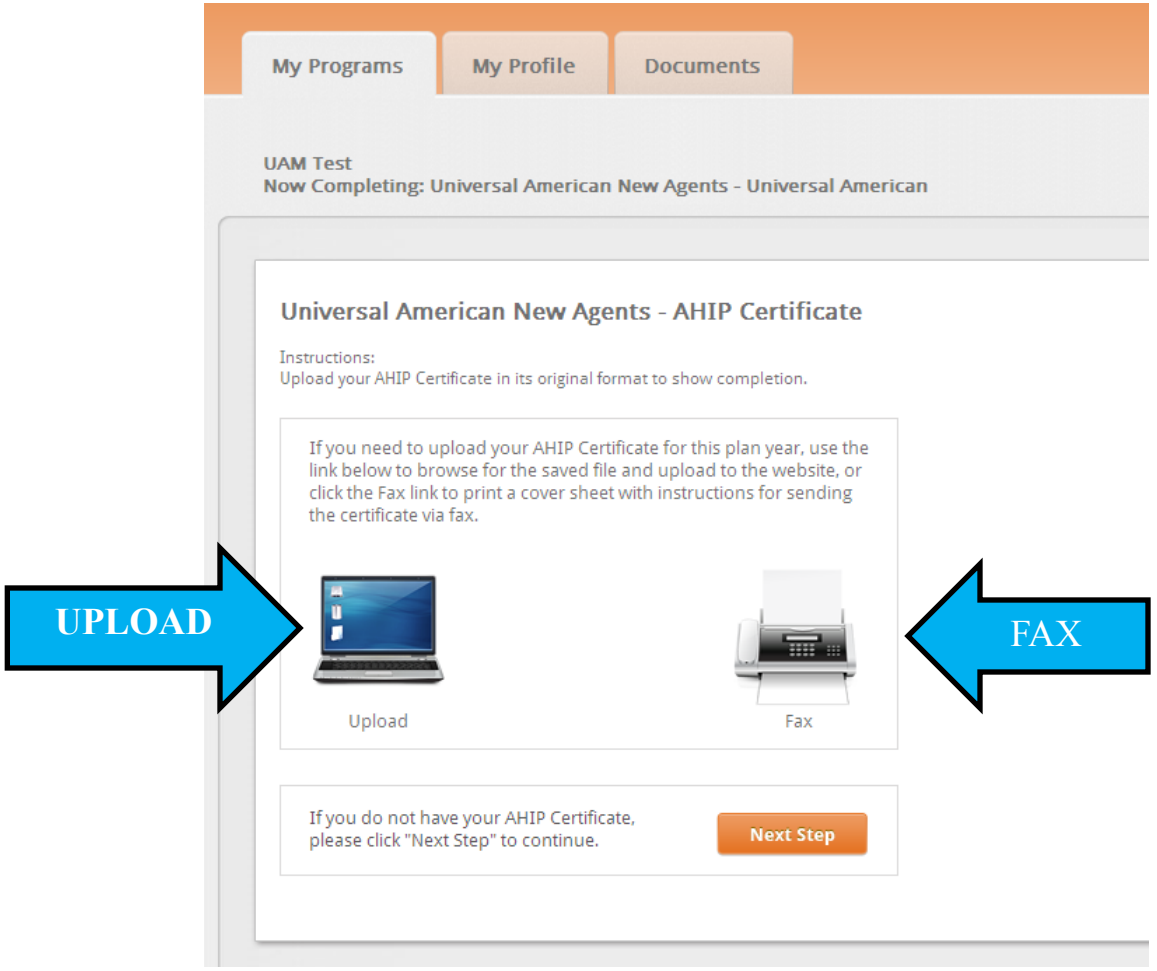
AHIP

- You will have the ability to upload or fax a valid AHIP certificate.
- To upload, you will need to click the "**Upload Icon**" and locate the electronic copy on their computer . Once the file is located the agent will click "**Upload**."
- To fax, you will need to click the "**Fax Icon**." A fax cover sheet will become available. You will need to print the fax cover sheet and fax it with the valid AHIP certificate to the number listed.
- You can click "**Next Step**." once an upload or fax is completed or if the agent does not have an AHIP certificate.



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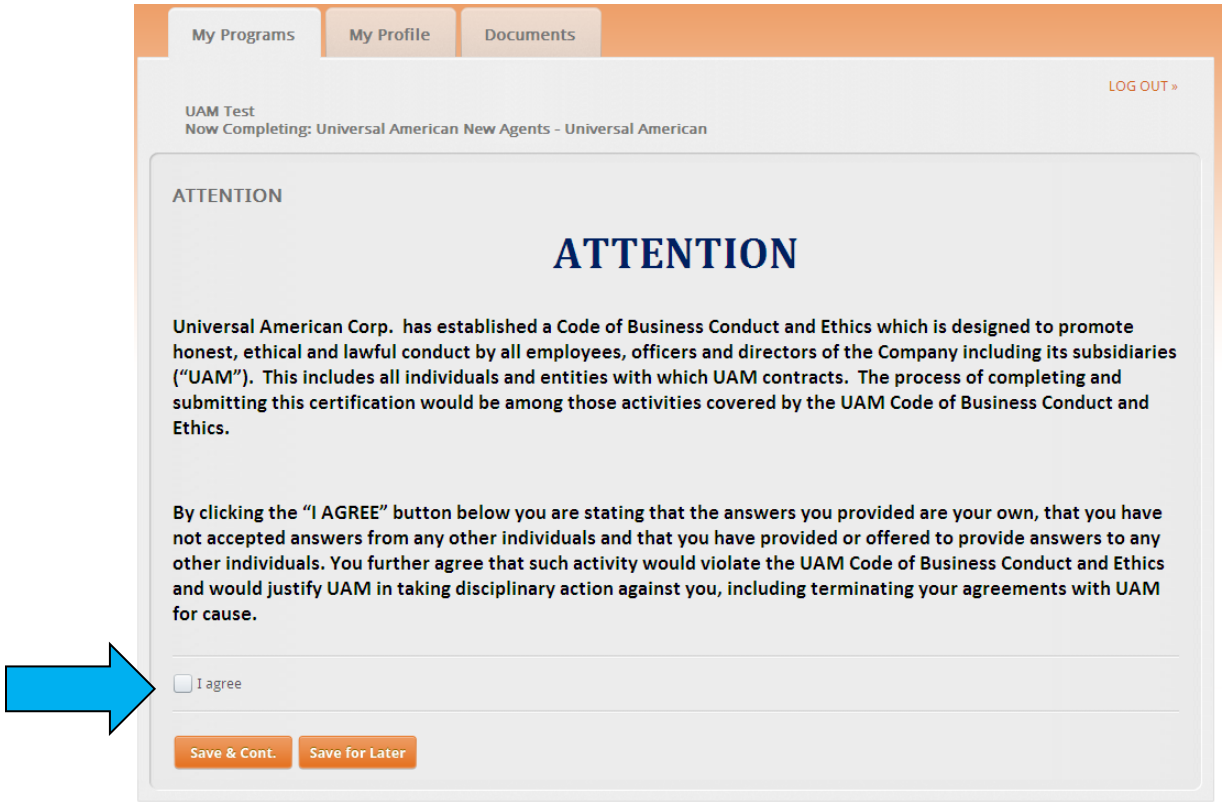
Universal American Training Integrity Attestation

- All agents will need to review this form titled **Attention** and select "**I agree**" to proceed.



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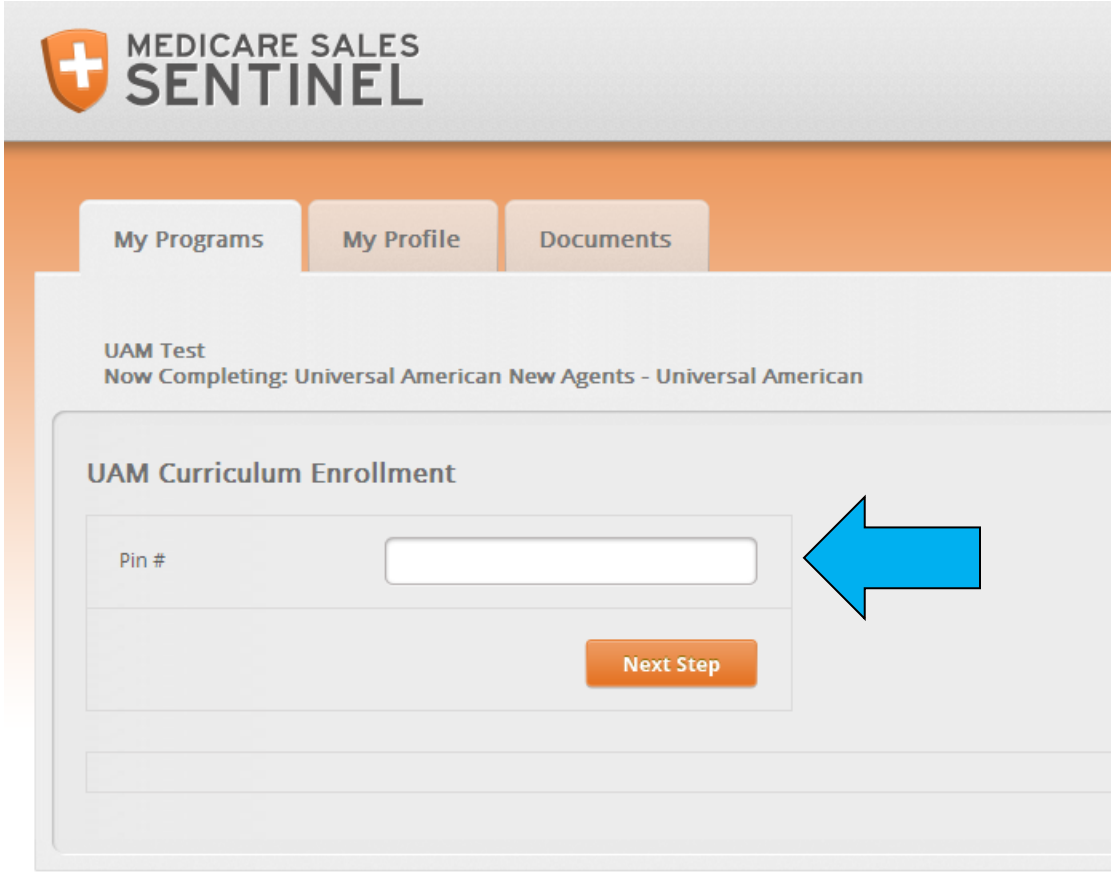
PIN Number- New Agent Only

- New agents will be required to enter their pre-assigned PIN # and click "**Next Step**" to proceed to training.
- The PIN # is assigned/issued through Universal American's contracting process.
- If a valid PIN # is not entered the agent will not be permitted to proceed.
- **Existing Agents will not have to complete.**



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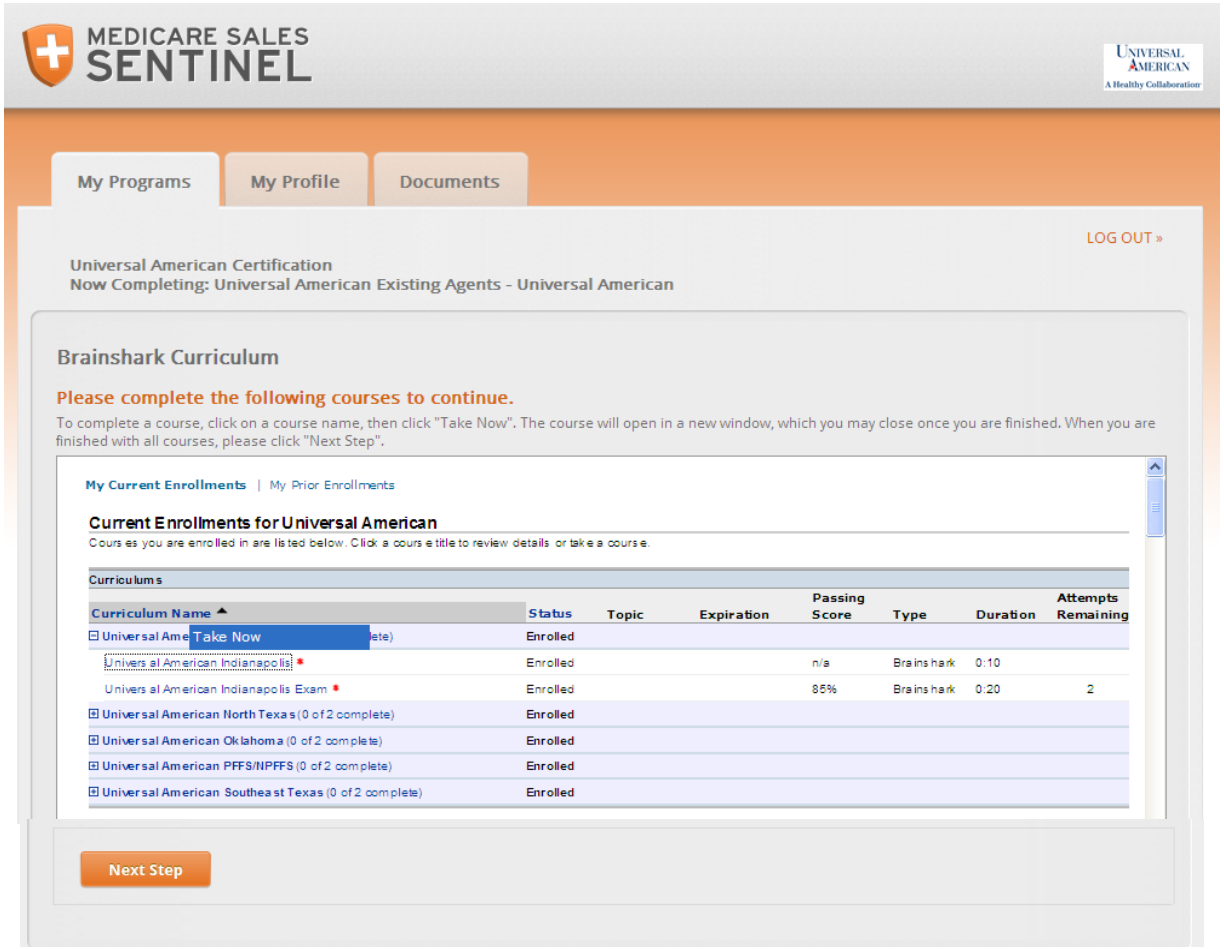
Completing Curriculum

- All agents will be required to complete all prerequisite training, core training, if applicable, and product training in order to complete certification.
- Each agent is required to view each slide and score **85% or higher to pass each exam. Exam attempts are limited to 2**.



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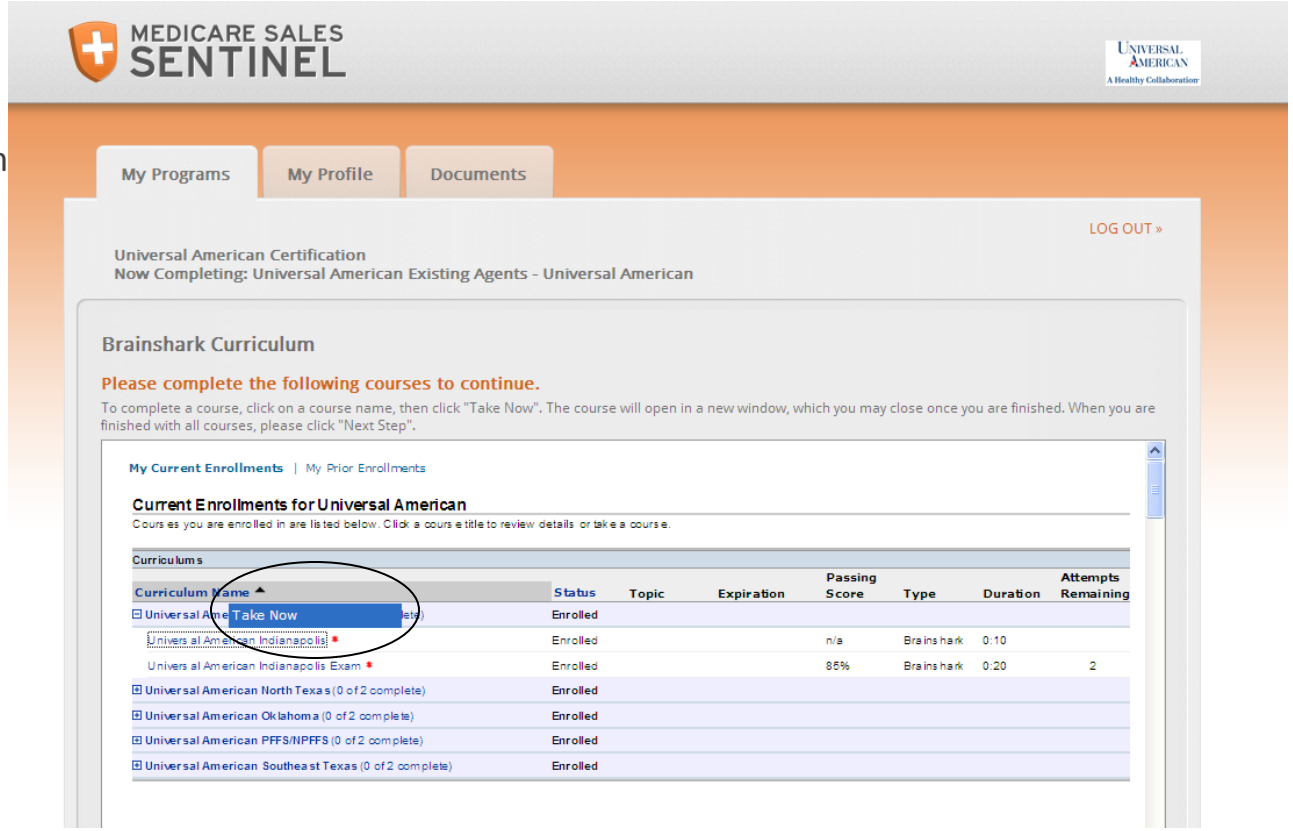
COMPLETING THE CURRICULUM

Opening Courses/Exams

- To begin a curriculum you will need to click on the Curriculum name, select the available course, and select take now.
- Once you select take now, the training will load in another window



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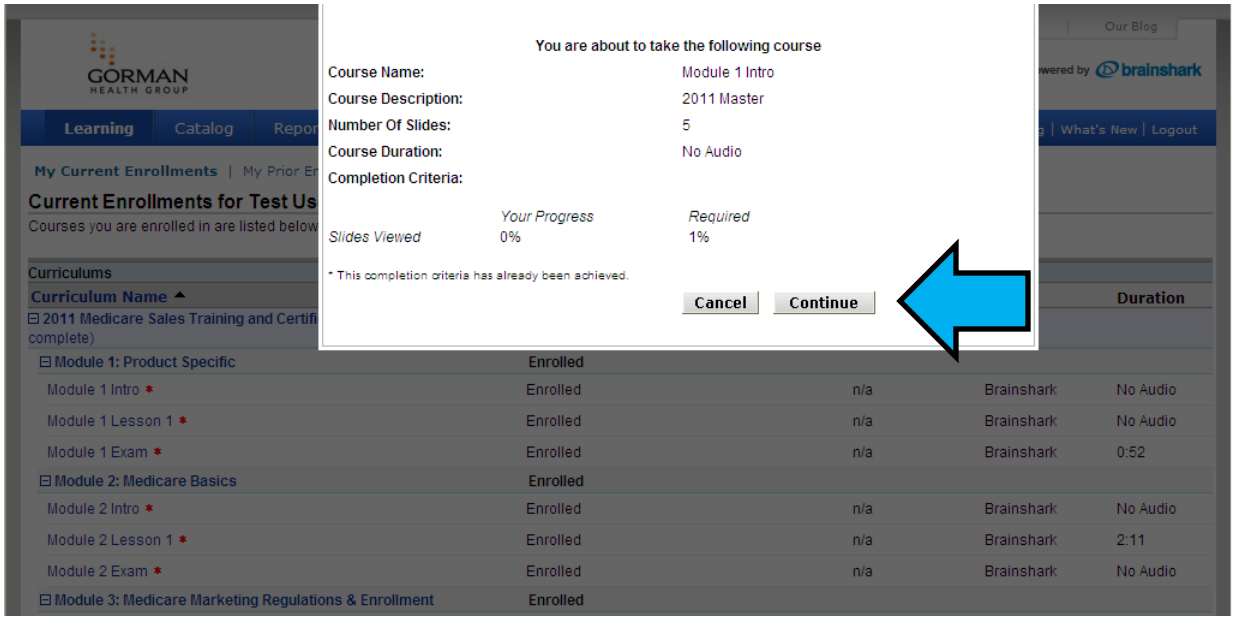
COMPLETING THE CURRICULUM

Course Details

- After selecting "**Take now**" the screen shown to the right will appear displaying the course /exam details.
- To begin the course/exam you will need to click continue.



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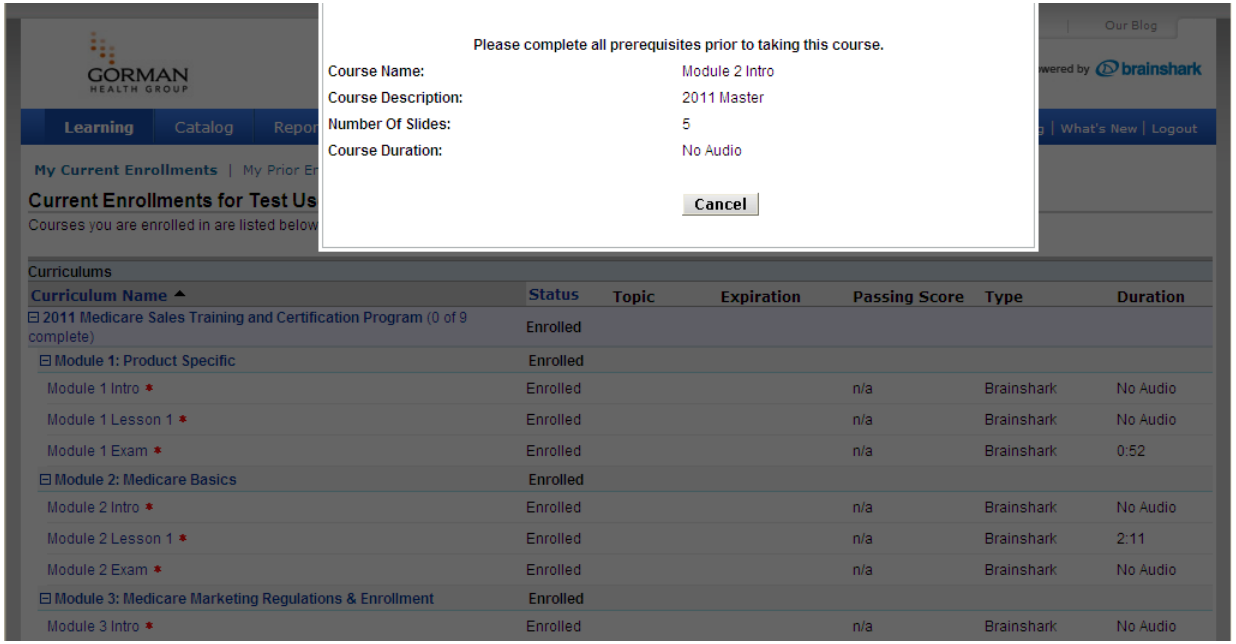
COMPLETING THE CURRICULUM

Prerequisite not met

- If you select a course where a prerequisite has not been completed, this screen will display a notification letting you know that you need to complete another course before you will be able to advance to the next course. Select '**Cancel**' to return to your Current Enrollment page.



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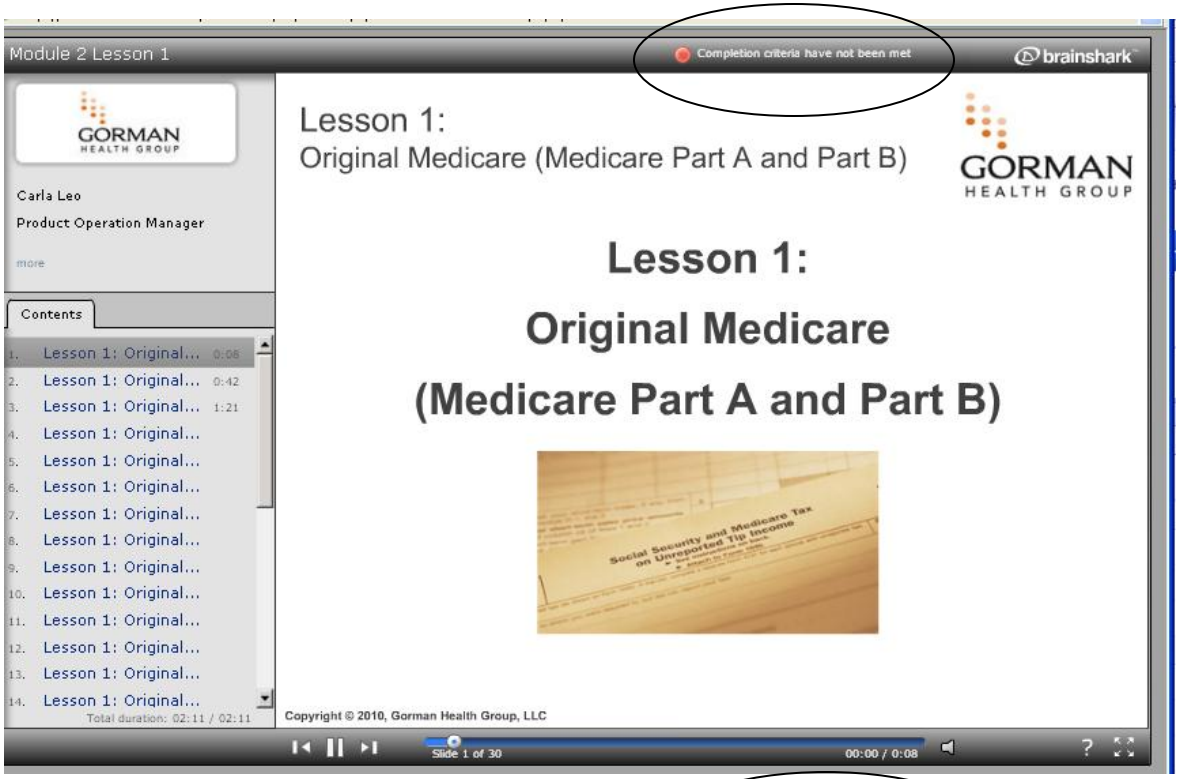
COMPLETING THE CURRICULUM

Course/Exam Window

- Before you start the training, please make sure that **your volume is on**.
- **Completion Criteria Indicator:** The completion criteria indicator is displayed in the upper right hand corner of the Module Window. **RED** indicates that the completion criteria has not been met. The indicator will turn **GREEN** when you have met the completion criteria for the module.



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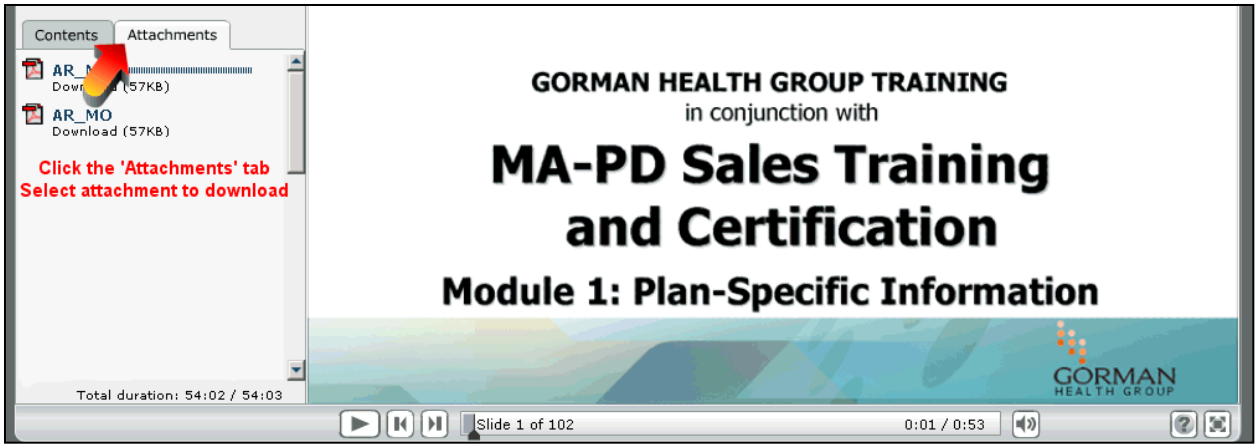
COMPLETING THE CURRICULUM

Attachments Tab

- **Attachments Tab:** During all of the Module trainings, there are two tabs displayed on the left-hand side of the window. One is titled '**Contents**' and the other is titled '**Attachments**'. The attachments listed can be downloaded to help you during the training.
- Simply click on one of the attachments listed to open or save the attachment to your PC.



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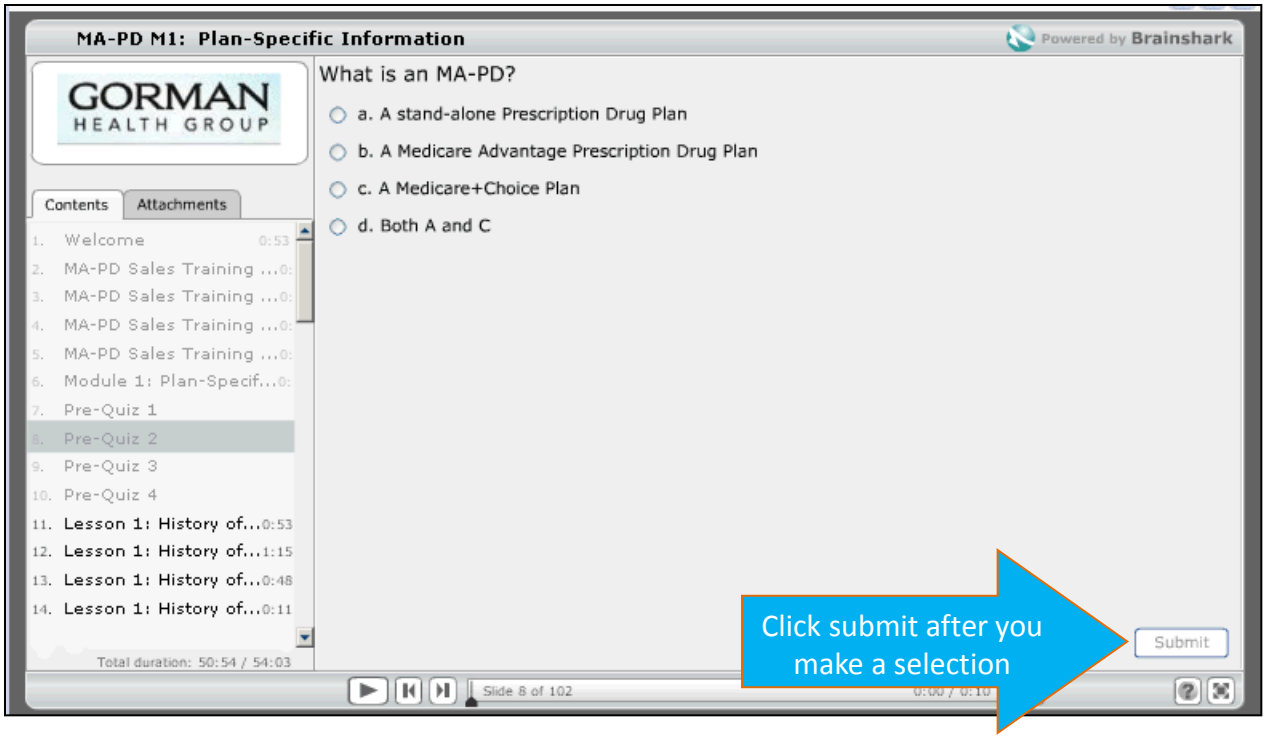
COMPLETING THE CURRICULUM

Interactive Course Slides and Exam Questions

- Select an answer and then click ‘Submit’ at the bottom right corner of the screen.
- A message will be displayed indicating if your answer is correct or incorrect.



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COMPLETING THE CURRICULUM

Curriculum Completion

Here are some more details on how your trainings are compiled and what they consist of.

- **Curriculums are made up of modules and exams. Each of your curriculums will have a specific set of completion criteria guidelines that are set by your Plan. You may have more than one curriculum in your Current Enrollment Screen.**

- Modules will contain courses (or lessons) and may have prerequisite requirements and completion criteria. Completion criteria is also defined by the amount of the material within each course that must be viewed and/or the amount of audio. These criteria can be found under 'Course Details.'

- Exams follow each module of the curriculum and are very helpful study resources. We highly recommend that users complete the individual module exams in preparation for the Final exam. An exam criterion also varies by Plan. Some exams are optional, others may be required. Most Exams have a minimum passing score (85%) in order to consider complete.

- *Users are allowed only a certain number of attempts to pass the Final Exam. This number will be represented of the curriculum page next to the final exam.*

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COMPLETING THE CURRICULUM

Final Exams

- The Final Exam is a cumulative exam of all your module courses within your curriculum. You will be able to review your course materials prior to selecting the Final Exam.
- After your review of the modules, click on the Final Exam link. Once you begin the Final Exam, you must complete it in its entirety. Ending the Exam without completion may result in a failing score and may count towards one of your opportunities to pass the Final. You will be able to review the course material again, if needed, prior to taking the Final exam a second time.
- **Number of Attempts:** Your number of attempts will be presented to you on your training screen.

To receive Certification you must complete the review of all required training courses and must pass all exams with a minimum score of 85%.

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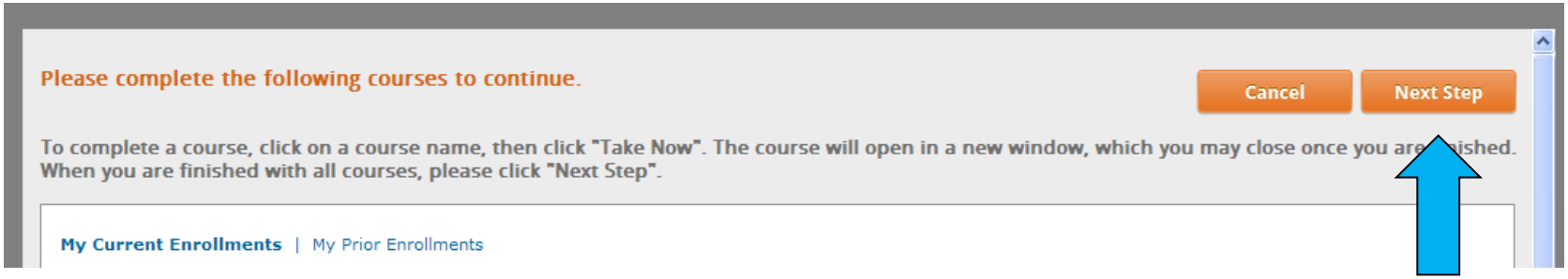
NEXT STEP

After you have successfully passed the curriculum

Click "**NEXT STEP**" to advance in your program

Depending on your program, you may be presented with another training curriculum in My Current Enrollments or you may proceed to another required step in your program.



2013 Universal American requires you to complete their Compliance Fraud, Waste and Abuse and Dual Eligible Training, after you click "Next Step" you will be provided with the Core training curriculum. Once you've completed Core Training you will be provided with the Product Training curriculum.

Upon completion, please click "Next Step"

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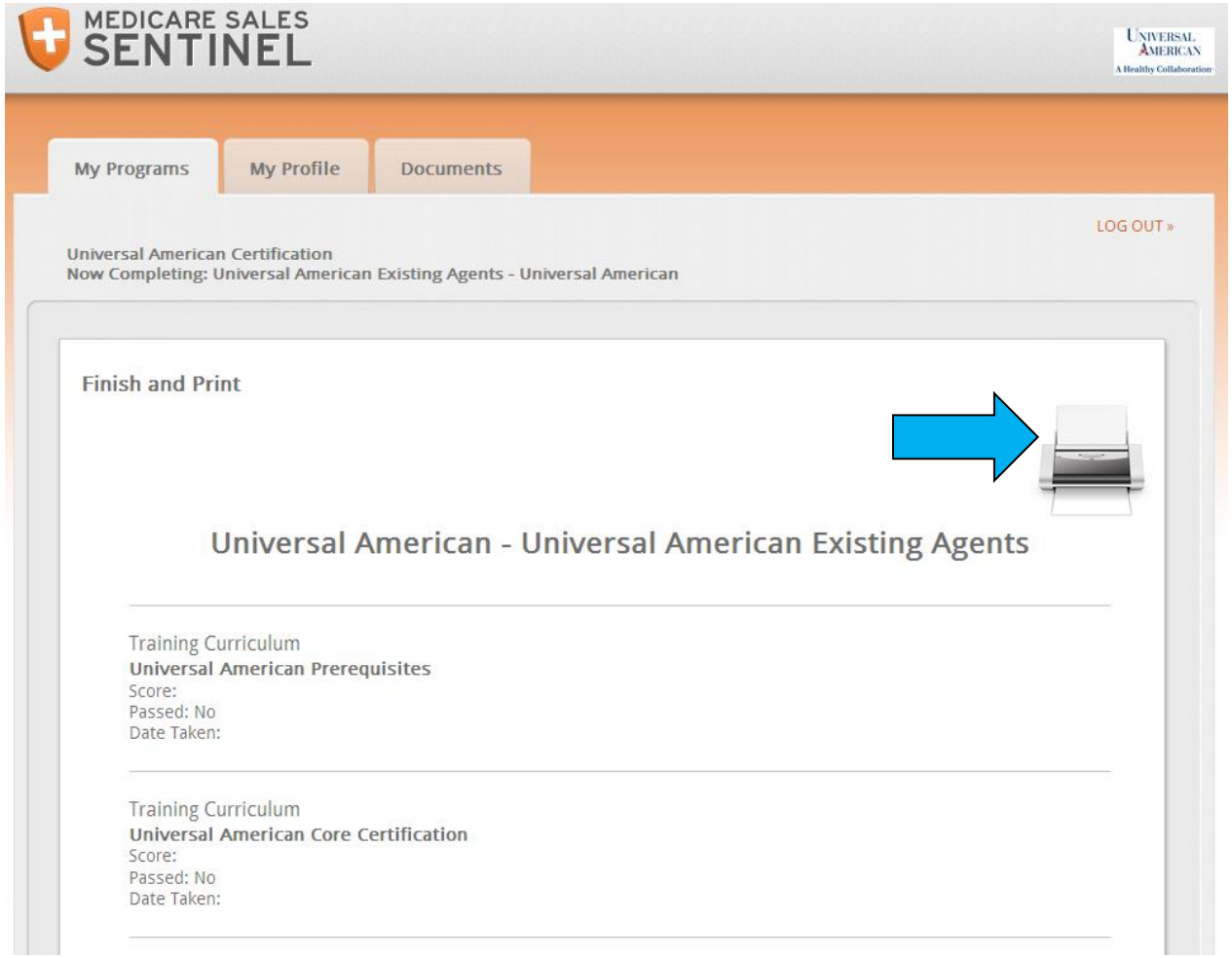
UNIVERSAL AMERICAN PROGRAM

Finish and Print

- Once you completed all required information the "**Finish and Print**" screen will become available.
- This screen will allow you to print a record of all completed program steps.
- To print this page, you will need to click on the **Printer Icon** indicated with the blue arrow.
- This is the Final step in 2012 Agent Certification Process.



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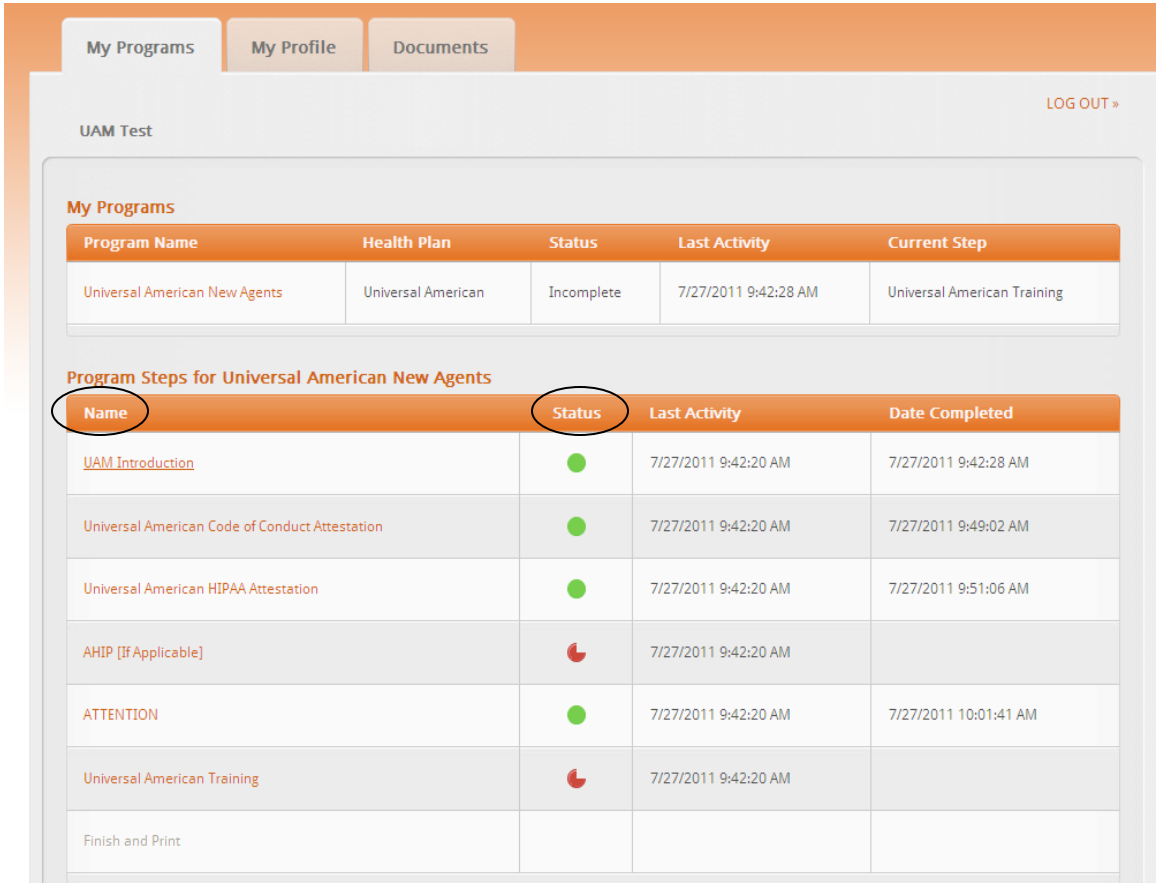
Additional Information – My Programs Tab

- After logging in, returning users will be taken directly to the My Programs tab.
- The My Programs tab will display what steps are required to complete the Universal American program.
- The status indicates if the step has been completed, is incomplete, or has not started or is not required.
- If an agent needs to complete a Program Step, the step can be accessed by clicking directly on the step name. The Agent will be taken directly to the Program step if the prerequisite has been met.



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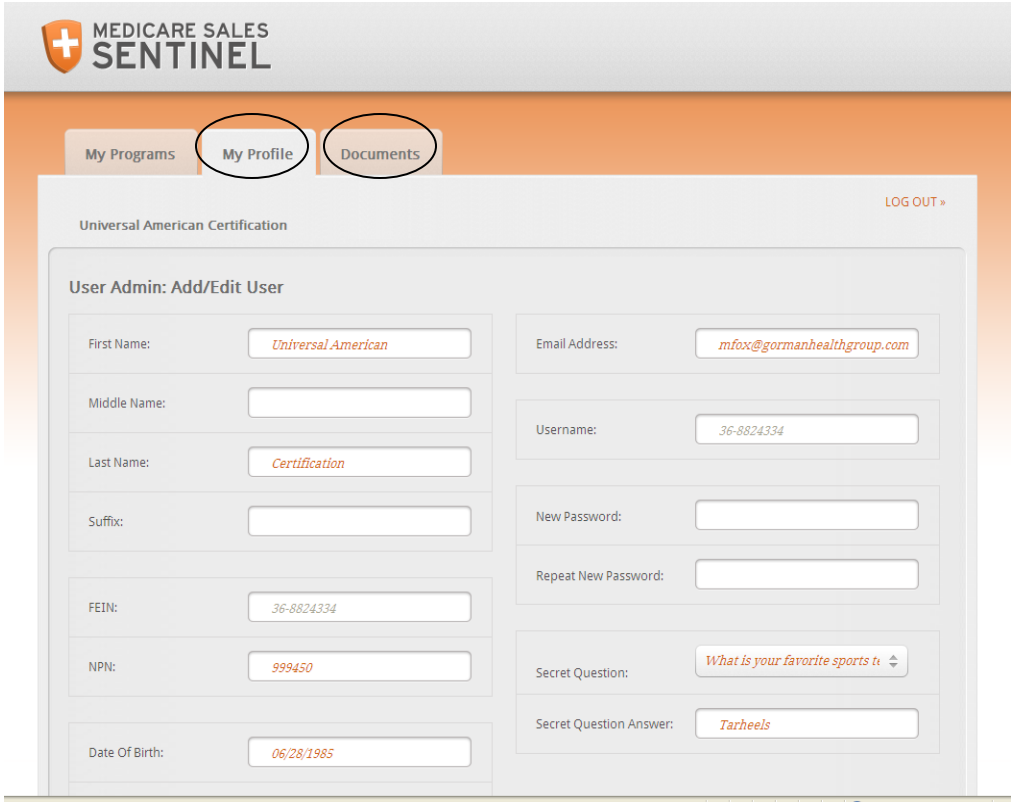
Additional Information – My Profile and Documents Tabs

- The "**My Profile**" tab will display what you completed on the registration screen. You can make changes such as the spelling of a name, an address and recreate a password.
- The "**Documents**" tab will contain any documents/forms you have uploaded or faxed to the Medicare Sales Sentinel site.



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Weekdays 8am – 7pm ET
Weekends 10am – 3pm ET

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Gorman Health Group is a national health care and federal programs consultancy staffed by subject matter experts, former health plan executives and seasoned regulators. For 15 years, hundreds of clients serving millions of consumers have leveraged GHG's strategic counsel and technology solutions to achieve growth objectives, maintain compliant operations, improve market positions, and advance profitability.

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