

Health Plan Management System Agent and Broker Training User Manual

Version 01.00
Contract Year 2010



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1 Introduction to Medicare Sales Training for Agents and Brokers

As provided under 42 CFR 422.2274(b) and 423.2274(b), Medicare Advantage Organizations (MAOs) and Prescription Drug Plan (PDP) sponsors are required to train all agents and brokers selling Medicare products on Medicare rules, regulations and compliance-related information annually. In addition, sections 422.2274(c) and 423.2274(c) require agents selling Medicare products to annually pass written or electronic tests on Medicare rules, regulations and information on the plan products they intend to sell.

As the oversight authority for Medicare programs, CMS would like to ensure that agents and brokers selling Medicare products have a clear understanding of Medicare rules. In order to ensure consistency in agent and broker training and testing on Medicare rules and compliance-related information, CMS is releasing a pilot agent and broker training module for the CY 2010 marketing season and hopes to expand the training module to all sales agents for the CY 2011.

In addition to this CMS training, agents and brokers will also be required to take the training and testing offered by the plans for which they sell Medicare products; the plan's training and testing will focus on plan specific products, i.e., plan offerings, benefits and cost-sharing. Only agents and brokers who successfully complete the CMS training module with a passing score of 85% or better, successfully complete their respective plan(s) training and testing requirements, and meet all other necessary requirements (i.e., state appointment and licensure) will be allowed to sell Medicare products for CY 2010.

To access the Agent and Broker Training, you must first register by accessing the registration URL provided below:

<https://hpmstraining.cms.hhs.gov/agentbrokertraining2009/event/registration.html>

Important Notice: The training will be available starting on July 31, 2009. **Please do not register before July 31, 2009.** Any user registrations that have been submitted before this date will be deleted from the system when the training is made available and you will be prompted to register again.

Once your registration has been submitted, you will receive an email that contains the URL for accessing the HPMS Agent and Broker Training. The following list provides an overview of the pages you will encounter as you progress through the training.

- **Registration:** Users will be asked to submit registration information prior to attending the training event. Completing the registration process will provide access to the training curriculum (Curriculum Information Page).
- **Curriculum Information Page:** The Curriculum Information Page displays all information related to the Agent and Broker Training. From this page, the user has the ability to view and complete the various courses in the training curriculum. These include:
 - Lesson 1 – Medicare Basics: This lesson provides background information on Medicare policy and the various Medicare product offerings.
 - Lesson 2 – Enrollment & Disenrollment: This lesson provides information on the enrollment and disenrollment procedures for Medicare beneficiaries.
 - Lesson 3 – Beneficiary Protections: This lesson provides information on the various rights and protections afforded to Medicare beneficiaries.
 - Lesson 4 – Marketing Materials: This lesson discusses guidelines for the correct use of Medicare marketing materials.
 - Lesson 5 – Marketing Events: This lesson provides information on permitted practices for Medicare agents/brokers at marketing events.

- Certification Exam: After the user has completed all Lessons, he/she will be able to access the Certification Exam. The user must pass the Certification Exam to obtain a certificate of completion and get credit for completing the Agent and Broker Training.
- Training Evaluation: The Training Evaluation is a short survey to obtain feedback from users on the Agent and Broker Training.

The remainder of this document will provide further detail and instruction for interacting with the various pages in the module, as well as technical support for any issues you may encounter.

2 Introduction to the Technical User Guide

2.1 Description

This document provides a complete overview of the Medicare sales training curriculum as provided through the Adobe Connect Pro framework. Registered users may refer to this document for assistance with technical and operational issues.

All processes involved with the setup, registration and attendance of the Medicare training curriculum are addressed within this document. Content is divided into sequential topics and incorporates screenshots, where applicable, to support instructional text.

2.2 Technical Support

In addition to the general instruction for taking the training, this document also provides situational technical support to users. The support content will be delivered on a topic-by-topic basis, and includes actions the user may take to resolve any incidents encountered while taking the training.

In the event that further support is required, the following resources are available:

- For **technical** questions (registration, accessing the training curriculum, Adobe Connect Pro issues, etc.), you may contact the CMS IT Service Desk at 1-800-562-1963. Again, this contact is for **technical** questions only.
- For all other **non-technical** questions concerning this training, contact training@LMpolicyresearch.com

3 Before you Begin

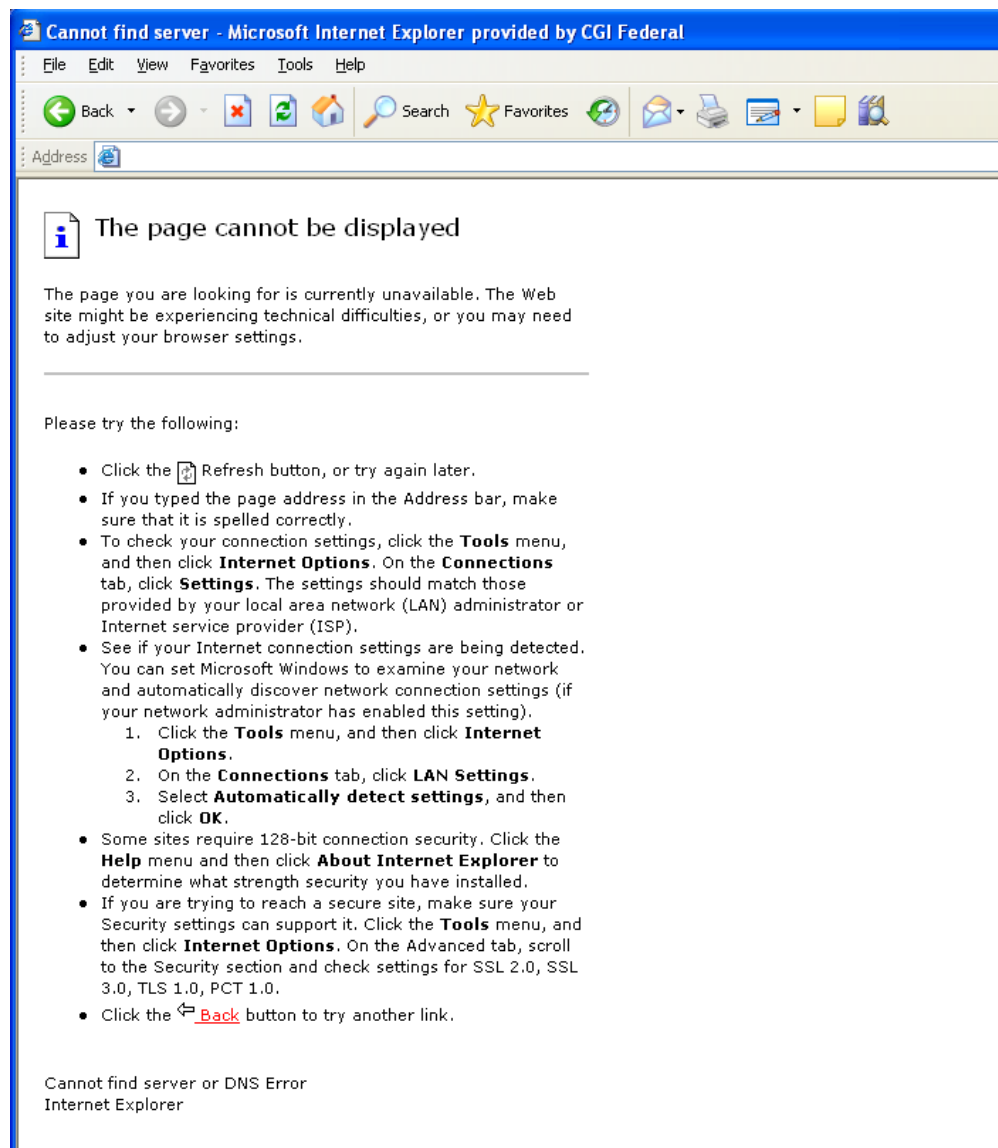
This topic discusses system requirements that are required to view and take the Medicare sales training. Users should address the following items before attempting to register for the training:

- Internet Explorer security settings
- Adobe Flash Player

3.1 Internet Explorer Security Settings

The Adobe Connect Pro server requires that TLS 1.0, SSL 2.0 and SSL 3.0 security protocols are enabled in order to view the registration and login pages. Users who do not have these protocols enabled may see the following error message:

Exhibit 1: 'Page Cannot be Displayed' Error



To adjust Internet Explorer's security settings, perform the following steps:

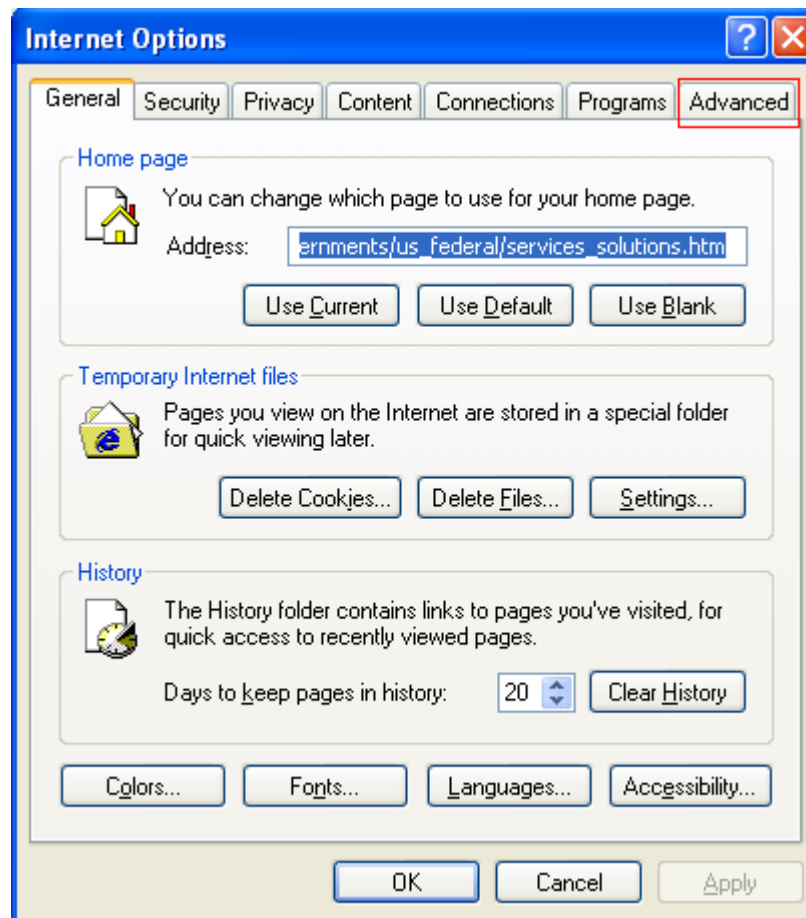
1. In the Internet Explorer browser window, select the Tools menu:

Exhibit 2: Tools Menu in IE



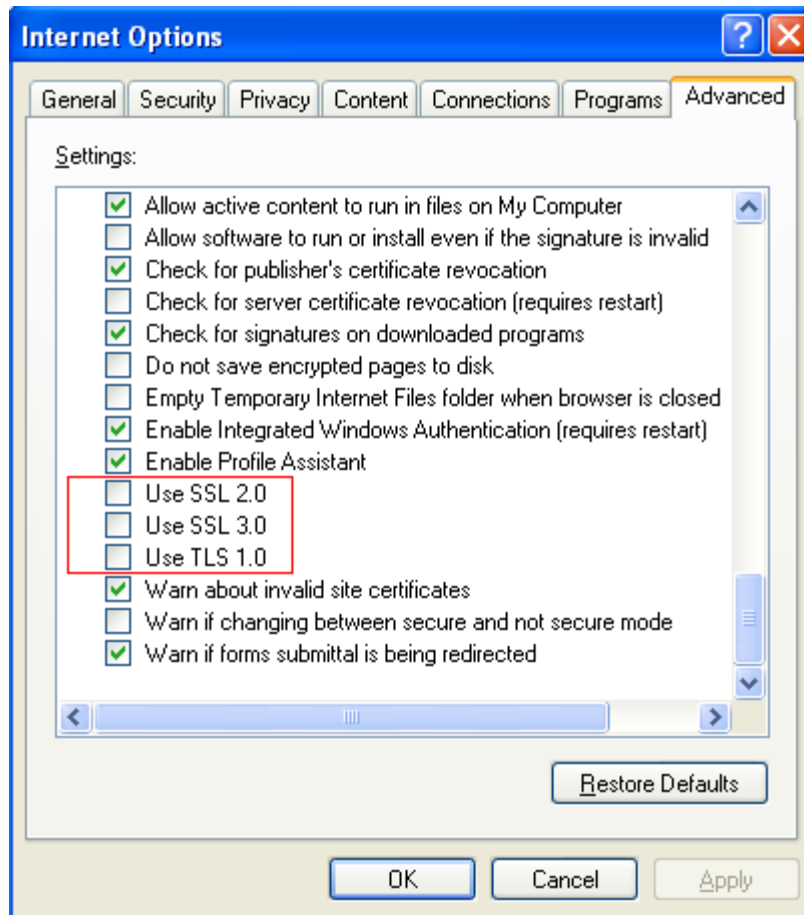
2. In the Tools Menu, select Internet Options
3. Select the Advanced Tab:

Exhibit 3: Advanced Internet Options Tab



4. Under the Security Settings, make sure the following boxes are checked:
 - ▶ TLS 1.0
 - ▶ SSL 2.0
 - ▶ SSL 3.0

Exhibit 4: Security Settings



5. Click Apply to submit the changes.
6. Click OK to close the window.

3.2 Adobe Flash Player

The Adobe Connect Pro interface requires Flash Player 9 or higher to view. Flash is available on the Adobe website at <http://get.adobe.com/flashplayer/>

4 Registration

This topic discusses the procedure for submitting a registration for the Medicare sales training curriculum. To provide user-specific support, the following scenarios are discussed:

- Registration for new users
- Users who have registered for another training/event/meeting hosted on the Connect Pro server
- Resetting a password

4.1 Obtaining the Registration URL


CMS will provide the URL to the registration for the Medicare sales training curriculum via the annual letter. Users can access the link to view the registration page.

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4.2 Registration for New Users

After clicking the registration URL, the user will be taken to the following page:

Exhibit 5: Registration Page



Agent/Broker Medicare Training

Welcome, please enter the following to continue.

If you have previously registered with us, [click here](#).

E-mail Address: *

Password: *

Retype Password: *

First Name: *

Last Name: *

Address 1: *

Address 2:

City: *

State: *

Zip: *

Direct Phone (XXX) XXX-XXXX: *

License Number: *

State(s) of License: *

NIPR #:

Plan Organization(s):

*- indicates required question

The following fields are displayed on the registration page:

Exhibit 6: Table of Registration Fields

Field	Description	Required?
E-mail Address	The user's E-Mail Address. This will serve as the user's login ID.	Y
Password	Enter a valid password. Must be between 8 and 32 characters, including one capital letter and one number.	Y
Retype Password	Enter the same value as the Password field	Y
First Name	User's first name	Y
Last Name	User's last name	Y

Address 1	Street Address of residence	Y
Address 2	Street Address of residence	N
City	City of residence	Y
State	State of residence	Y
Zip	Zip Code of residence	Y
Direct Phone	Phone Number. Entered as (XXX) XXX-XXXX	Y
License Number	User's license number to market Medicare products	Y
State(s) of License	State(s) in which the user is licensed to market Medicare products	Y
NIPR #	User's National Insurance Producer Registry #	N
Plan Organization(s)	Organization(s) employing the user	N

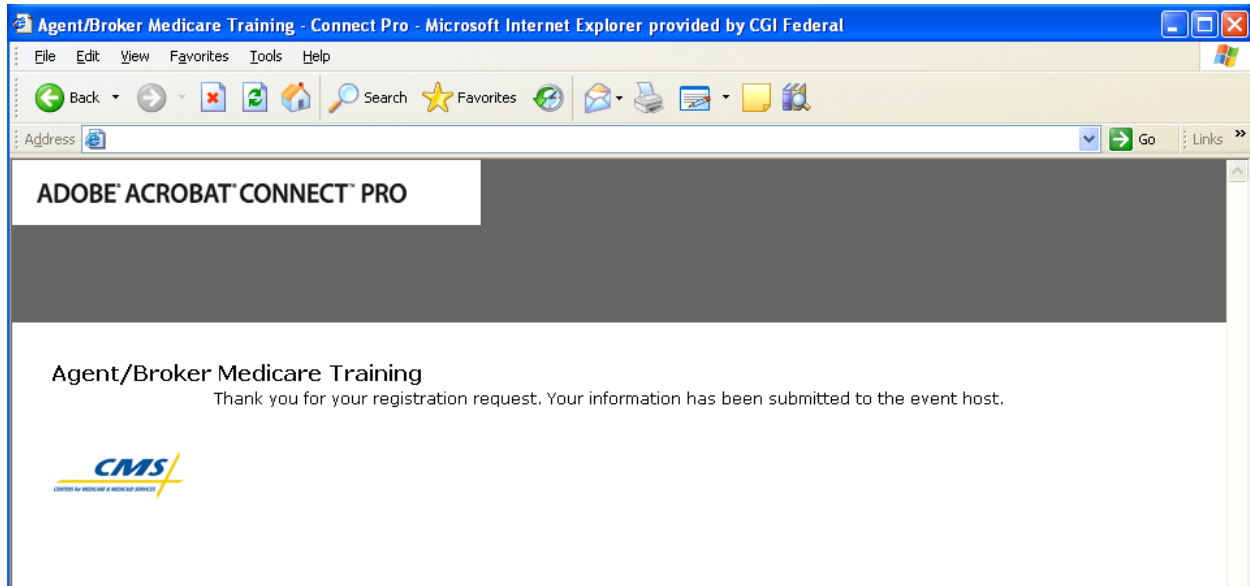
To submit a registration, perform the following steps:

1. In the E-Mail Address field, enter a valid email address
2. In the Password field, enter the desired password
 - ▶ **NOTE:** the password must be between 8 and 32 characters, and must include at least one capital letter and at least one number.
3. In the Retype Password field, enter the same value entered in the Password field
4. Enter a First Name
5. Enter a Last Name
6. Enter the address of residence in the Address 1 field
7. Enter additional address information in the Address 2 field (if applicable)
8. Enter the City of residence
9. Select the State of residence using the drop-down list
10. Enter the Zip code of residence
11. Enter the Direct Phone Number
12. Enter your NIPR #
13. Enter your Medicare agent or broker License Number
14. Select the State(s) of Operation in which you are licensed to market Medicare products
15. Select the Plan Organization(s) you are affiliated with
 - ▶ **Note:** Required fields are flagged with a red asterisk. The user will not be able to submit the registration until he/she has entered information in all the required fields, at a minimum.

16. Once data has been entered in all registration fields, click the Submit button to complete the registration process.

If all required data entry has been satisfied, the system will display the registration confirmation page:

Exhibit 7: Registration Confirmation Page



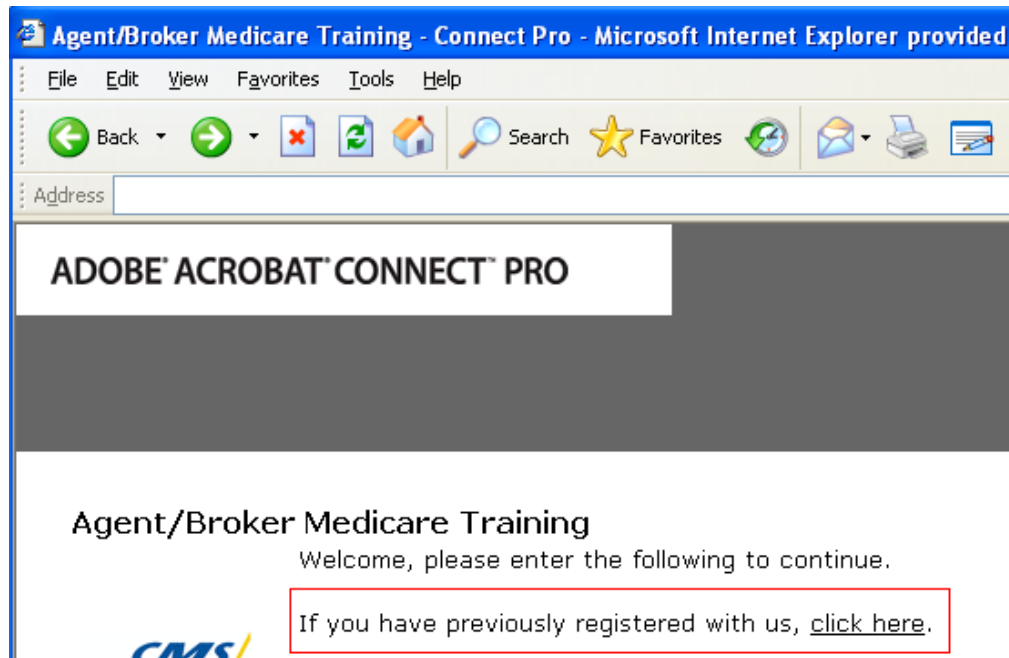
4.3 Previously Registered Users

Some users may have submitted registration information for other training offerings, meetings or events hosted through Adobe Connect Pro. These users may encounter an error when attempting to register with the same email address used for earlier trainings, meetings and events.

Users who have registered for Adobe Connect trainings, meetings or events can register for the Medicare sales training using the following steps:

1. Access the registration page
2. Click the hyperlink in the statement "If you have previously registered with us, click here."

Exhibit 8: Link for Previously Registered Users



3. The system will take the user to the following page:

Exhibit 9: Registration Page for Previously Registered Users

The screenshot shows a web browser window titled "Agent/Broker Medicare Training - Connect Pro - Microsoft Internet Explorer provided by...". The browser's address bar is empty. The page header features the "ADOBE ACROBAT CONNECT PRO" logo. Below the header, the page title "Agent/Broker Medicare Training" is displayed. A CMS logo is visible on the left. The main content area contains the following text and form elements:

Enter your e-mail address and password below if you have previously registered with us.

Login:


Password:

[Forgot your password?](#)

4. Enter the email and password combination from the previous registration
5. Click the Continue button
6. The user will be prompted to verify and/or update their registration information:

Exhibit 10: Verify Registration Information Page

Agent/Broker Medicare Training
Welcome Reed Smollar, please enter the following to continue.



Address 1: *

123 Smith Street

Address 2:

City: *

Kalamazoo

State: *

Michigan

Zip: *

37891

Direct Phone (XXX) XXX-XXXX: *

(763) 873-7362

License Number: *

16345723

State(s) of License: *

Maine
Marshall Islands
Michigan
Minnesota
Missouri

NIPR #:

Plan Organization(s):

Ardent Health Services.
Arkansas Blue Cross Blue Shield
Arnett Health Systems
AvMed, Inc.
Aveta Health Illinois, Inc.

* - indicates required question

Submit

Note: Registration fields may differ between events/training/meetings hosted on Adobe Connect Pro. The user will still need to enter information for all required fields for this training event.

7. Click the Submit button to complete the registration process.

4.4 Resetting a Password

Adobe Connect Pro allows users to reset passwords in the event they are forgotten or need to be updated for security reasons.

To reset a password, users should perform the following steps:

1. Access the registration URL
2. Click the hyperlink in the statement “If you have previously registered with us, click here.”
3. Click the Forgot Your Password? Link under the Continue button:

Exhibit 11: Forgot Your Password Link

Agent/Broker Medicare Training - Connect Pro - Microsoft Internet Explorer provided by...

File Edit View Favorites Tools Help


Back Forward Stop Home Search Favorites Refresh Mail Print

Address

ADOBE ACROBAT CONNECT PRO

Agent/Broker Medicare Training

Enter your e-mail address and password below if you have previously registered with us.



Login:

Password:

[Forgot your password?](#)

The system will take the user to the following page:

Exhibit 12: Request Reset Password Page

The screenshot shows a web browser window titled "Agent/Broker Medicare Training - Connect Pro - Microsoft Internet Explorer provided by CGI Federal". The browser's address bar is empty. The page header features the "ADOBE ACROBAT CONNECT PRO" logo. Below the header, the page title "Agent/Broker Medicare Training" is displayed. To the left of the main text is the CMS logo, which includes the text "CMS" and "CENTERS for MEDICARE & MEDICAID SERVICES". The main text area contains the following instructions: "To create a new user password for your account, please enter your e-mail (login) information below. You will receive an e-mail providing a link and instructions to securely set your new password." and "If you do not want to reset your password, please click on the 'Cancel' button to return to the login screen." Below this text is a text input field labeled "E-mail:". At the bottom of the form are two buttons: "Submit" and "Cancel".

Agent/Broker Medicare Training

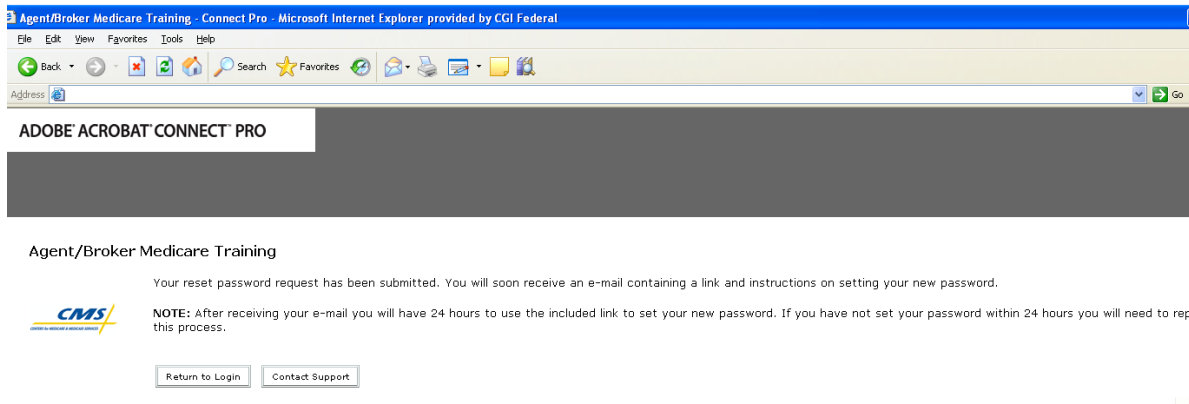
To create a new user password for your account, please enter your e-mail (login) information below. You will receive an e-mail providing a link and instructions to securely set your new password.

If you do not want to reset your password, please click on the "Cancel" button to return to the login screen.

E-mail:

4. Enter the appropriate email address
5. Click the Submit button. The system will display the following confirmation page:

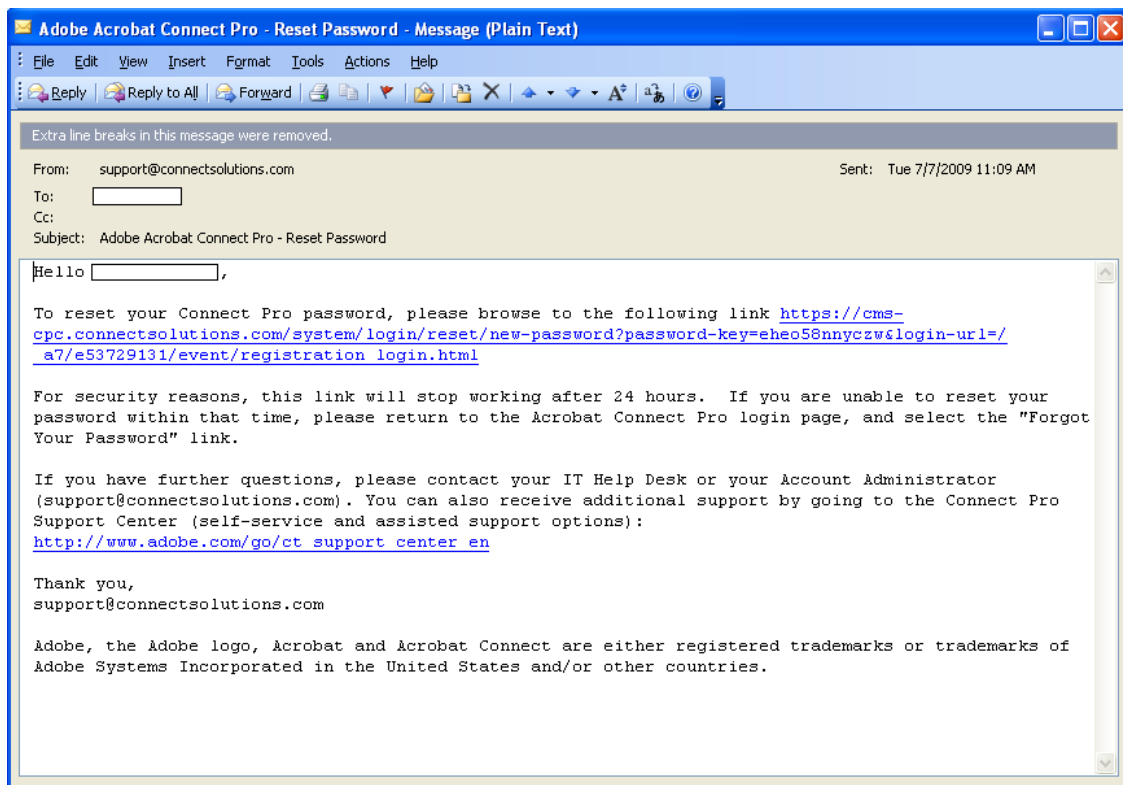
Exhibit 13: Reset Password Request Submitted Page



Note: Requesting to reset a password does not deactivate the user's previous password.

After submitting the reset password request, the system will generate the following email to the specified address:

Exhibit 14: Reset Password Email



The email provides a link for the user to reset his/her password. A notice is provided that the reset password link will expire after 24 hours.

6. Click the link to reset the password. The user is taken to the reset password page:

Exhibit 15: Create New Password Page

Set Your New Password

Please enter your new password in the fields below and then press the "Submit New Password" button.

Passwords must conform to the following rules:

- Passwords must contain a number
- Passwords must contain a capital letter
- Passwords must be between 8 and 32 characters long.

New Password:

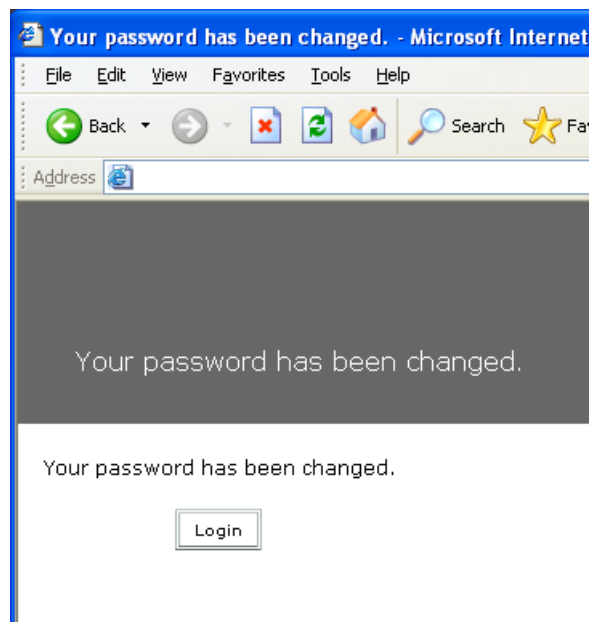
Confirm Password:

(Please note that passwords are case-sensitive.)

CMS
CENTERS for MEDICARE & MEDICAID SERVICES
Center for Drug and Health Plan Choice

7. Enter the desired password in the New Password field
8. Enter the identical value in the Confirm Password field
9. Click the Submit New Password button. The following message is displayed if the password is successfully reset:

Exhibit 16: New Password Confirmation



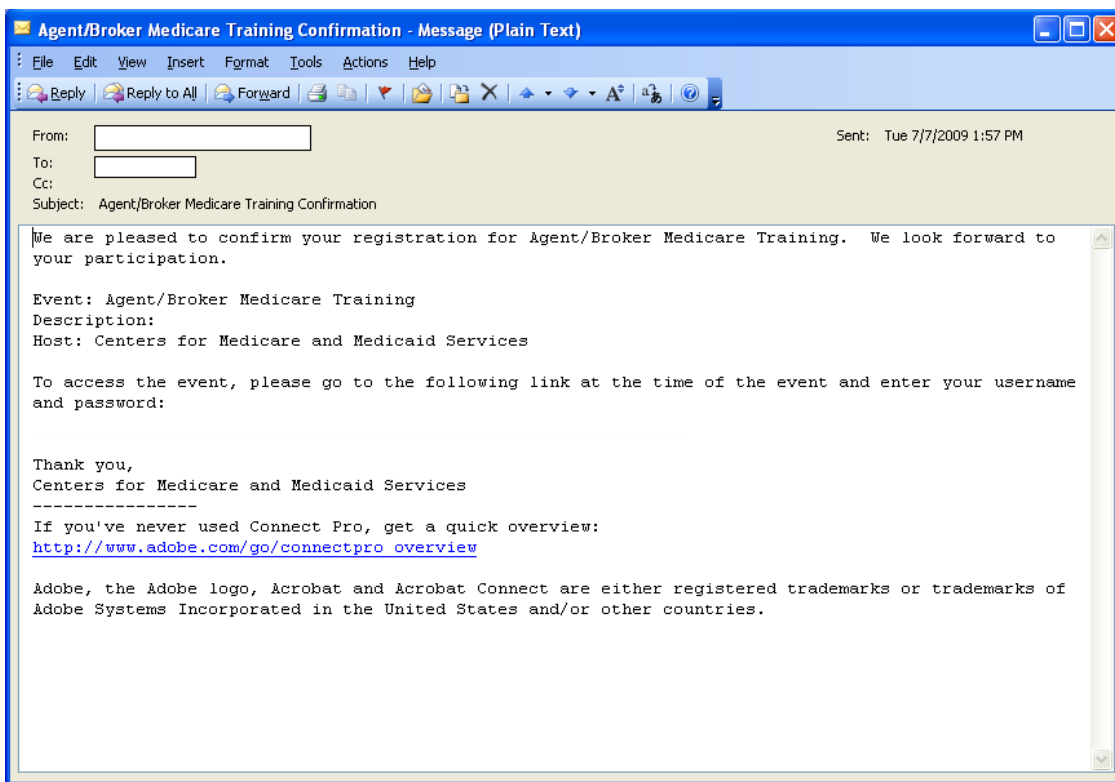
In the event that the user waits more than 24 hours to reset a password, the reset password link provided in the email will expire. The user will still be allowed to click the reset password link, view the reset password page, and enter new password information. However, the system will display an error message when the user attempts to submit a new password.

- If the reset password link expires, the user will have to repeat the process of requesting a password reset again.

4.5 Registration Confirmation Email

When the user successfully completes the registration process for the Medicare sales training event, the system generates a confirmation email to the address specified during registration:

Exhibit 17: Registration Confirmation Email



The confirmation email contains the following information:

Exhibit 18: Table of Confirmation Email Information

Field	Description
Event	Event Name
Description	Provides summary information on the training event
Host	Host of the event. In this case, the Centers for Medicare and Medicaid Services (CMS)

In addition to the summary information on the training event, the confirmation email provides the user with the login link for the training curriculum.

4.6 Potential Issues

The following items describe scenarios users may encounter during the registration process:

1. Password is not being accepted during registration
 - ▶ Make sure that the format of the password is correct (8-32 characters, one capital letter, one number)

- ▶ Make sure that Password and Confirm Password fields are identical
2. The system will not let me register with my email address
 - ▶ Have you registered for another Connect Pro event/meeting/training in the past? If so, use the link for 'If you have registered with us previously, click here.' Enter your previous email/password combination, then verify or update registration information before submitting the registration.
 - ▶ The email address may be registered to another user.
 3. I registered. How do I get to the training?
 - ▶ After completing the registration process, the system will send a confirmation email to the address specified during registration. The confirmation email provides a link to the event login page.
 4. The link to reset the password expired, but I still need to reset my password.
 - ▶ You may request a new reset password link by entering your email address as shown in the previous steps. The system will send you a new email with a new link to reset your password.

5 Logging In to the Training

This topic discusses the process of logging in to the training event in Adobe Connect Pro.

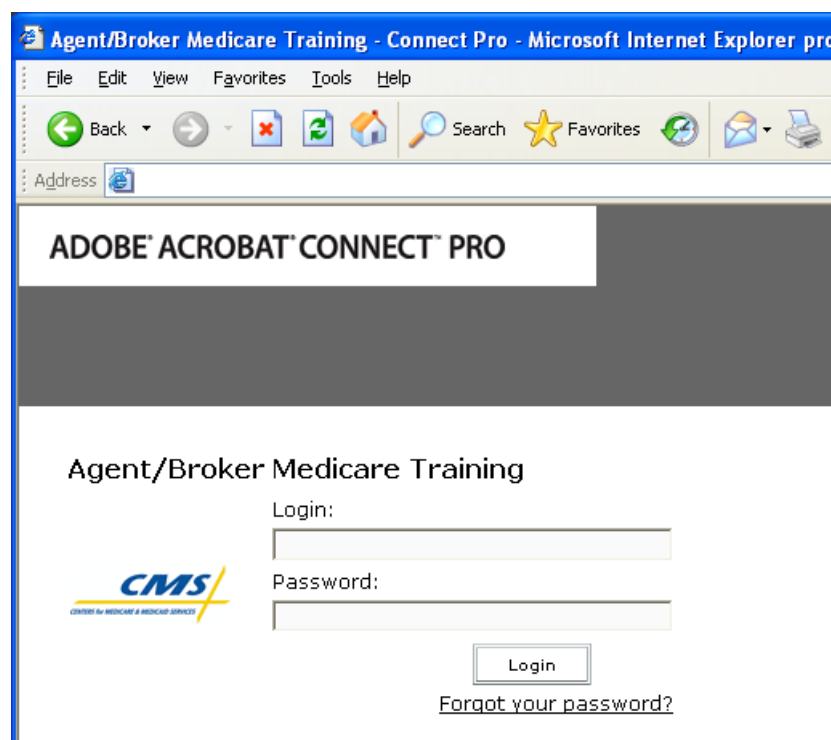
5.1 Logging In

Adobe Connect Pro provides a confirmation email to all users that complete the registration process. The email includes a link to the event login page in Connect.

To log into the Medicare sales training event, perform the following steps:

1. Access the registration confirmation email sent by Adobe Connect Pro
2. In the email, click the link to access the event login page. The following page will be displayed:

Exhibit 19: Event Login Page



3. Enter the email address and password used during the registration process
4. Click the Login button

5.2 Potential Issues

Users that experience difficulty/inability to log in to view the training curriculum can consider performing the following checks:

- Verify that the ID/Password combination being submitted is correct
- Reset the password and attempt the login process again

- There is a limit to the number of concurrent users, which may prevent users from logging into the training event. Wait until some time has passed before attempting to log in again.

6 Viewing the Training Curriculum

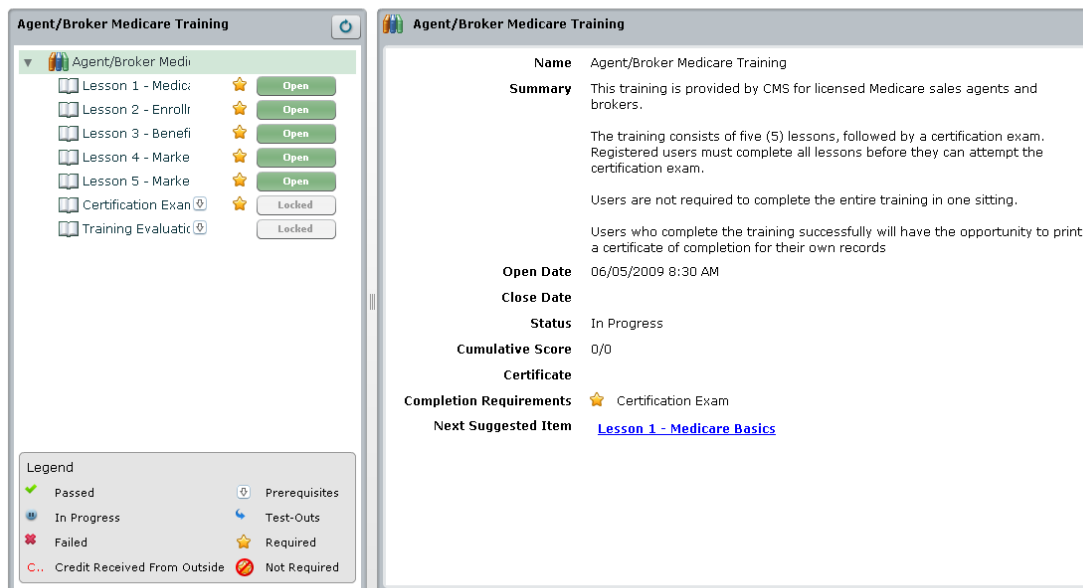
This topic discusses viewing and understanding the curriculum information page in Adobe Connect Pro. After this topic, users will be able to understand how course, curriculum, and completion information is displayed in the Adobe Connect Pro interface.

6.1 Layout

Upon logging in to Adobe Connect Pro, the Curriculum Information Page will be displayed:

Exhibit 20: Curriculum Information Page

ADOBE ACROBAT® CONNECT® PRO



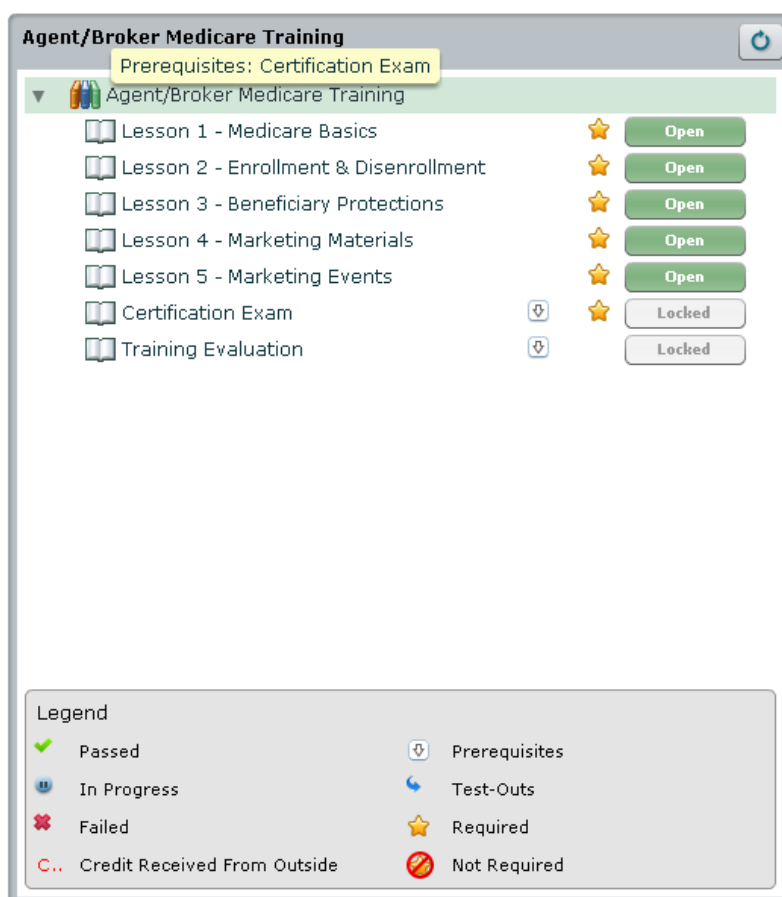
Copyright © 2001 - 2008 Adobe Systems Incorporated and its licensors. All rights reserved.

The curriculum information page is divided into two panes: left and right.

6.2 Left Pane

The left pane displays the curriculum name and drop-down list. By expanding the drop-down list, the user will be able to view all items included in the curriculum:

Exhibit 21: Left Pane/Curriculum List



The items are organized as follows:

- Lesson 1 – Medicare Basics
- Lesson 2 – Enrollment & Disenrollment
- Lesson 3 – Beneficiary Protections
- Lesson 4 – Marketing Materials
- Lesson 5 – Marketing Events
- Certification Exam
- Training Evaluation

Each item in the curriculum drop down is accompanied by a button. Clicking the button for an item will launch that item in the Flash Player window, provided that the selected item is not locked. The button status defaults to 'Open' and updates appropriately based on user progress.

6.2.1 Legend

At the bottom of the left pane is the Legend. The Legend explains the various symbols and icons that may be displayed alongside items in the curriculum drop-down list. The purpose of each is as follows:


Exhibit 22: Table of Legend Fields

Field	Purpose	Additional Notes
Passed	Indicates if a user has successfully completed an item	
In Progress	Indicates if a user has started, but not finished, an item	
Failed	Indicates if a user did not complete an item successfully	
Credit Received From Outside	Indicates if a user has received credit for an item from an outside source	May appear if: <ul style="list-style-type: none">▪ An Administrator gives a user credit for the item▪ If the item is overwritten by an updated version of the content
Prerequisites	Indicates if an item has prerequisites	If an item has prerequisites, it will not become available until all the prerequisites have been successfully completed
Test-Outs	Indicates if an item has test-outs	If an item has test-outs, the user will not have to take it, provided he/she successfully completes the test-outs
Required	Indicates if an item is required to complete the curriculum	If an item that is required to complete the curriculum has prerequisites, the prerequisites will also be flagged as Required
Not Required	Indicates if an item is not required to complete the curriculum	

6.3 Right Pane

The right pane displays summary information for the curriculum and the various items. The pane is dynamic, and displays summary information for whatever item is highlighted in the left pane.

Exhibit 23: Right Pane

 **Agent/Broker Medicare Training**

Name Agent/Broker Medicare Training

Summary This training is provided by CMS for licensed Medicare sales agents and brokers.

The training consists of five (5) lessons, followed by a certification exam. Registered users must complete all lessons before they can attempt the certification exam.

Users are not required to complete the entire training in one sitting.

Users who complete the training successfully will have the opportunity to print a certificate of completion for their own records

Open Date 06/05/2009 8:30 AM

Close Date

Status In Progress

Cumulative Score 0/0

Certificate

Completion Requirements ★ Certification Exam

Next Suggested Item [Lesson 1 - Medicare Basics](#)

If the curriculum is highlighted in the left pane, the following fields will be displayed in the right pane:

Exhibit 24: Table of Left Pane Summary Fields

Field	Purpose
Name	Displays the Name of the curriculum
Summary	Displays high-level descriptive information for the curriculum highlighted in the left pane
Open Date	Date the curriculum becomes available to users
Close Date	Date the curriculum becomes unavailable
Status	Displays the user's progress for the curriculum
Cumulative Score	Displays the most recent or current score the user achieved on the Certification Exam
Certificate	Displays the randomly generated certificate number assigned once the user passes the Certification Exam

Completion Requirements	Displays any items that must be successfully completed in order to obtain the certificate number
Next Suggested Item	Displays the next suggested item (generally a prerequisite or completion requirement) that the user should access

If a course item is selected in the left pane, the following fields will be displayed in the right pane:

Exhibit 25: Table of Right Pane Summary Fields

Field	Purpose
Title	Displays the Name of the course item
URL for Viewing	Displays the course's Adobe Connect Pro URL
Course ID	Displays the course's custom ID value (if applicable)
Summary	Provides high-level summary information about the course
Attempts	Displays the maximum number of attempts a user has to pass the course item
Duration	Displays the total time of the course item (if applicable)
Language	Displays the language of the course item
Status	Displays the user's progress on the course
Score	Displays the user's most recent or current score for the course (if there are any graded quiz questions included)
Date Taken	The date the user completed the course item
Attempts	Shows the cumulative number of attempts the user has accumulated out of the maximum allowed attempts
Prerequisites	Displays any items the user must complete before the selected course item is available
Test-Outs	Displays any test-outs for the selected course item


6.4 Completion Requirements, Prerequisites, and Test-Outs

This topic briefly describes the distinction between completion requirements, prerequisites, and test-outs within the Adobe Connect Pro framework.

6.4.1 Completion requirements

Completion requirements are items that must be completed to obtain certification at the *curriculum* level. Until these items are successfully completed, the user will not get credit for completing the training. You can view the curriculum's completion requirements by highlighting the curriculum item in the left pane:

Exhibit 26: Completion Requirements

 **Agent/Broker Medicare Training**

Name	Agent/Broker Medicare Training
Summary	<p>This training is provided by CMS for licensed Medicare sales agents and brokers.</p> <p>The training consists of five (5) lessons, followed by a certification exam. Registered users must complete all lessons before they can attempt the certification exam.</p> <p>Users are not required to complete the entire training in one sitting.</p> <p>Users who complete the training successfully will have the opportunity to print a certificate of completion for their own records</p>
Open Date	06/05/2009 8:30 AM
Close Date	
Status	In Progress
Cumulative Score	0/0
Certificate	
Completion Requirements	★ Certification Exam
Next Suggested Item	Lesson 1 - Medicare Basics

The Certification Exam is listed as the sole completion requirement for the training curriculum. This means that users must pass the exam in order to receive certification.

6.4.2 Prerequisites

Prerequisites are identified at the *course* level. If an item in a curriculum has prerequisites, this means that the user must complete the prerequisite items first before he/she can access that particular item/course. You can view a course's prerequisites by highlighting that item in the left pane:

Exhibit 27: Prerequisites

The screenshot shows a web application window titled "Certification Exam". It has two tabs: "Overview" (selected) and "Reports". The main content area displays the following information:

Title	Certification Exam
URL for Viewing	This item is locked because the prerequisites have not been completed.
Course ID	
Summary	This is the final certification exam for the Agent/Broker Medicare Training. The exam consists of 50 randomly generated questions that cover information presented throughout all of the previous lessons. You must achieve a score of 85% or more to pass.
Max Attempts	Unlimited
Duration	-
Language	English
Status	Not Taken
Score	
Date Taken	
Attempts	0/Unlimited
Prerequisites	Lesson 1 - Medicare Basics (Required) Lesson 3 - Beneficiary Protections (Required) Lesson 4 - Marketing Materials (Required) Lesson 5 - Marketing Events (Required) Lesson 2 - Enrollment & Disenrollment (Required)
Test-Outs	This item has no test-outs.

As seen above, the Certification Exam lists the five lessons as prerequisite items. Until the user completes the lessons, the Certification Exam will be locked – that is, inaccessible.

6.4.3 Test-Outs

Test-outs are also identified at the *course* level with Adobe Connect Pro. Test-outs allow users the opportunity to avoid taking certain items within a curriculum. For example, if a course has test-outs, and the user successfully completes those test-outs, he/she will not be required to take the course.

Note: No items in the Medicare sales training curriculum have test-outs.

6.5 Potential Issues

The following items describe scenarios users may encounter while viewing curriculum information:

1. I see a 'CR' next to an item in the Curriculum. What does this mean?
 - This generally means the content item itself was overwritten with an updated version. In other situations, an Administrator may have given you credit for the course.
2. If I get a 'CR' on an item, do I have to take it?

- ▶ If you were in progress on the item, you will have to start it over again
 - ▶ If you have not yet started the item, you will still have to take it
 - ▶ If you have previously completed the item, you do not need to take it again
3. I got a 'CR' for the last item I needed to make the Certification Exam available, but the Exam is still locked.
- ▶ Getting a 'CR' will not satisfy a prerequisite. You must still complete all prerequisites to unlock the Certification Exam
4. I got a 'CR' on the Certification Exam. Why do I not have a Certificate Number?
- ▶ Getting a 'CR' will not satisfy a curriculum completion requirement. You must still pass the certification exam to get the certificate number

7 Taking the Training

This topic discusses the process of taking the training. The topic covers the following:

- Accessing a course item
- Explanation of the Flash Player window
- Bookmarking
- Knowledge Check Questions
- Course Review Quiz
- Completion of a course item

7.1 Accessing a Course Item

The user has multiple options for opening and viewing a course presentation.

To launch a course, perform the following steps:

1. Select the course item in the left pane
2. To launch the course, either click the Open button next to the course item in the left pane, or click the Course URL hyperlink displayed in the right pane, as shown below:

Exhibit 28: Options to Open a Course

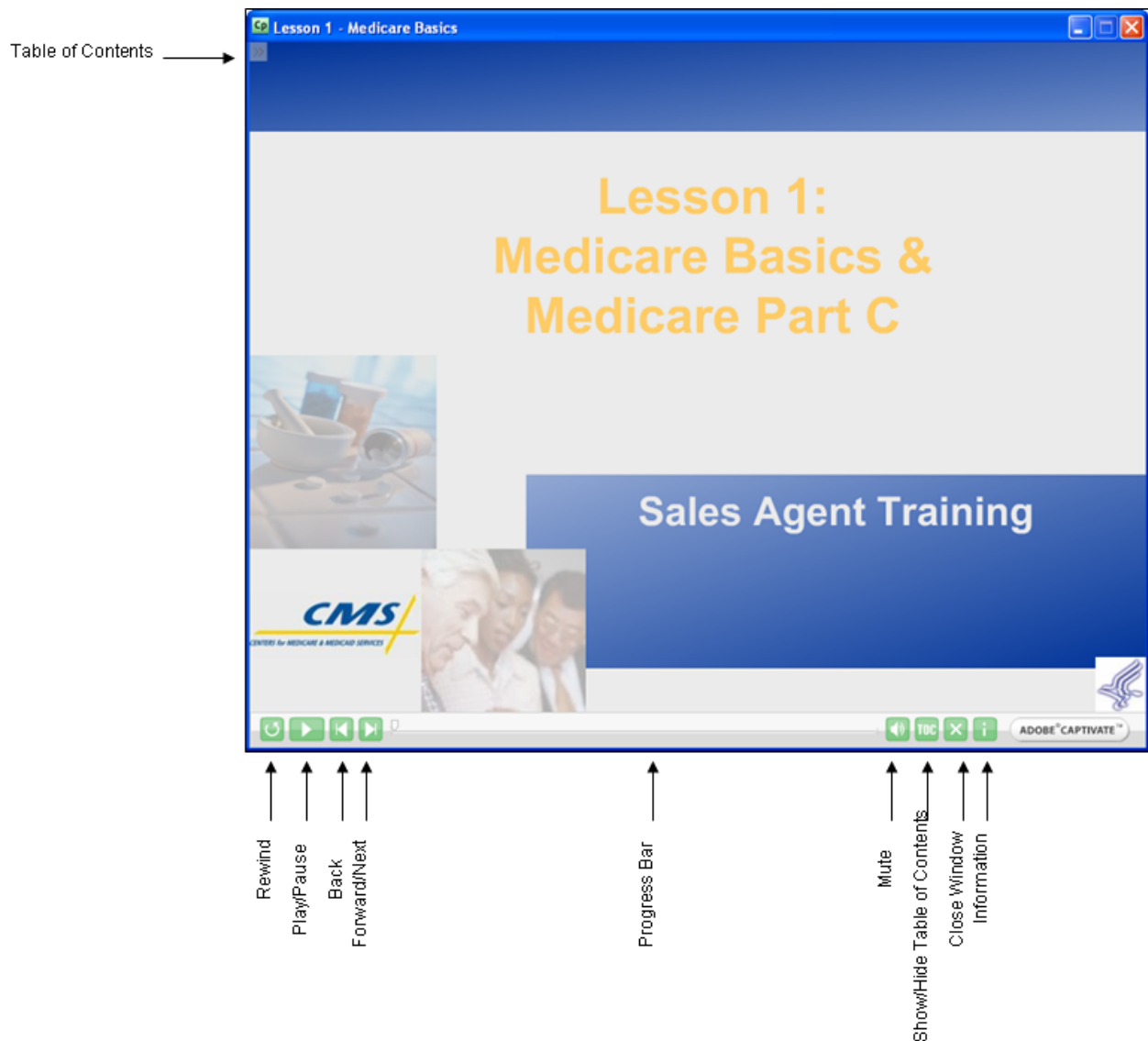


When the Open button or URL for viewing is selected, the presentation will launch in a Flash Player Window.

7.2 Understanding the Flash Player Window

Upon launching a course, the presentation opens. The presentation is 800 x 600, and requires Flash Player 9 or higher to view. There are many interactive features and buttons to assist in the navigation, as shown below:

Exhibit 29: Adobe Flash Player Window



The following table provides a description of each button and feature in the player window:

Exhibit 30: Table of Features of the Flash Player Window

Button	Purpose
Table of Contents	Shows/Hides the Table of Contents
Rewind	Returns the user to the first slide in the presentation
Play/Pause	Plays or pauses the presentation
Back	Navigates the user backwards one slide
Forward/Next	Progresses the user forwards one slide
Progress Bar	Displays the user's relative progress through the presentation

Mute	Enables/Disables audio features
TOC	Shows/Hides the Table of Contents
Close Window	Closes the presentation window
Info	Displays information about the presentation

When viewing the presentation, the player window provides several options for navigating between slides:

1. The user may click the Forward/Back buttons in the play bar
2. The user may click the Rewind button to return to the Title slide
3. The user may click on the progress bar to jump to a location in the presentation
 - **Note:** May not be used to skip over any unanswered question slides
4. The user may click anywhere on a non-question slide to advance to the next slide

7.3 Bookmarking

In the event that a user closes a presentation prior to completing a course, Adobe Connect Pro provides the ability to return the user to the last slide viewed the next time the presentation is launched without losing progress. This feature is called Bookmarking.

If the user closes a presentation prior to completing the course, the incomplete progress will be reflected on the Curriculum Information page:

Exhibit 31: Status Updates in Adobe Connect



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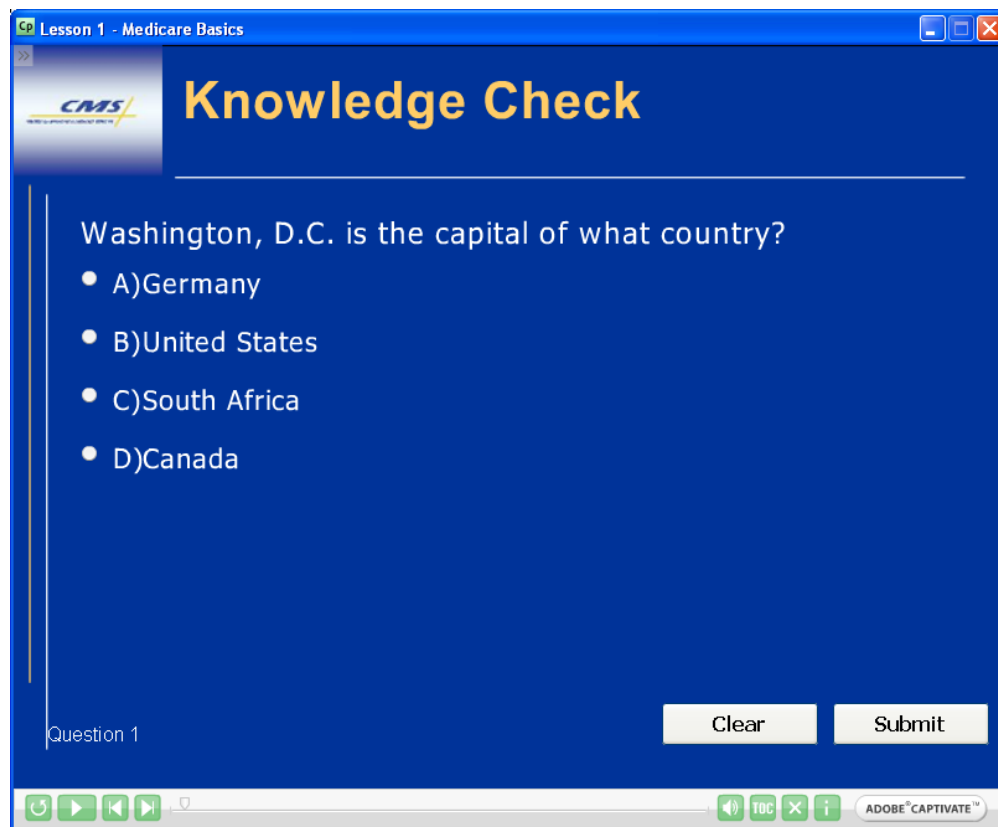
As shown above, course status will be updated to ‘In Progress’, and the course’s button text changes to ‘Continue.’

7.4 Knowledge Check Questions

Throughout a lesson presentation, the user will encounter Knowledge Check Questions. These questions provide an opportunity for users to reinforce the content they have viewed in a lesson. Knowledge check questions are unscored, and will not affect the user’s ability to achieve certification.

The layout of Knowledge Check questions is as follows:

Exhibit 32: Knowledge Check Question



While the user is on a Knowledge Check question, navigation is disabled. The user will not be able to skip the question or navigate backwards to review previous information. An answer is required.

The user has two attempts to submit the correct answer. Depending on whether the correct/incorrect answer is submitted, the system will display one of the following feedback messages:

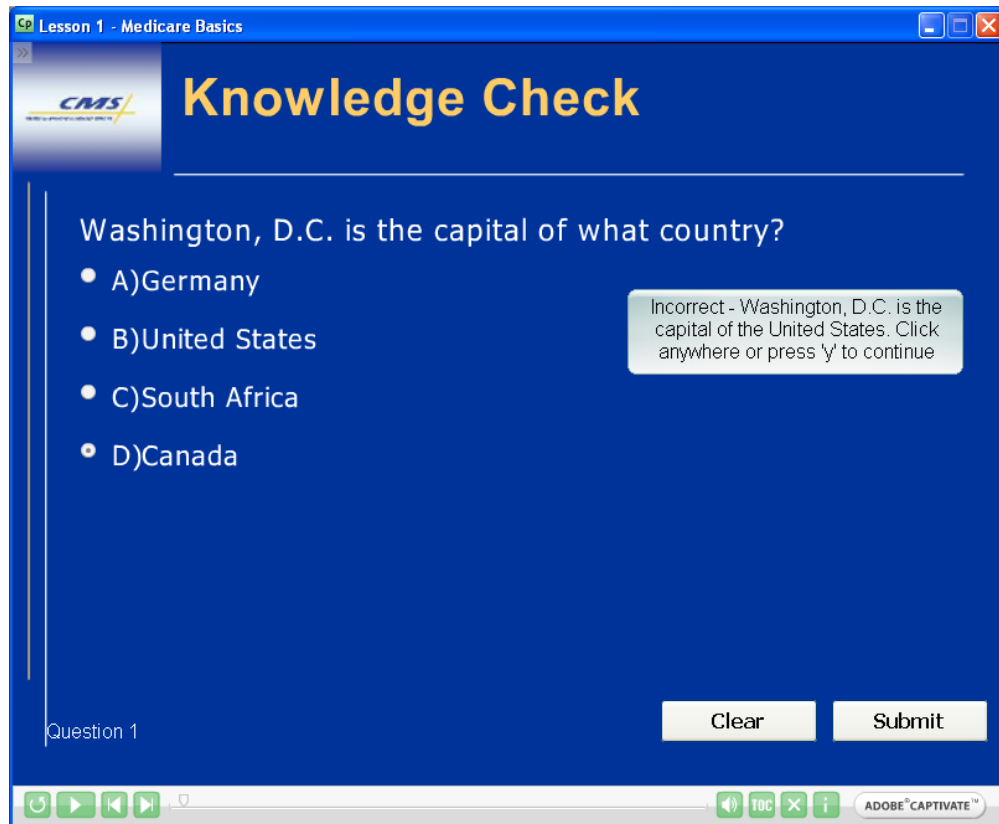
Exhibit 33: Table of Knowledge Check Feedback Messages

Message	Meaning
Correct – click anywhere or press 'y' to continue	User has submitted the correct answer
Incorrect – click anywhere or press 'y' to continue	User has submitted the incorrect answer on the second attempt
Try again	User has submitted an incorrect answer, but is allowed to attempt the same question again
You must answer the question before continuing	User has attempted to submit an answer without flagging any answer options

To submit an answer, the user selects the desired answer option radio button, and clicks the Submit button. If an answer is checked accidentally, the user may uncheck it by clicking the Clear button.

If the user is unable to submit the correct answer after two attempts, the Incorrect feedback message will be displayed. This feedback message includes additional explanatory text to identify the correct answer:

Exhibit 34: Incorrect Feedback

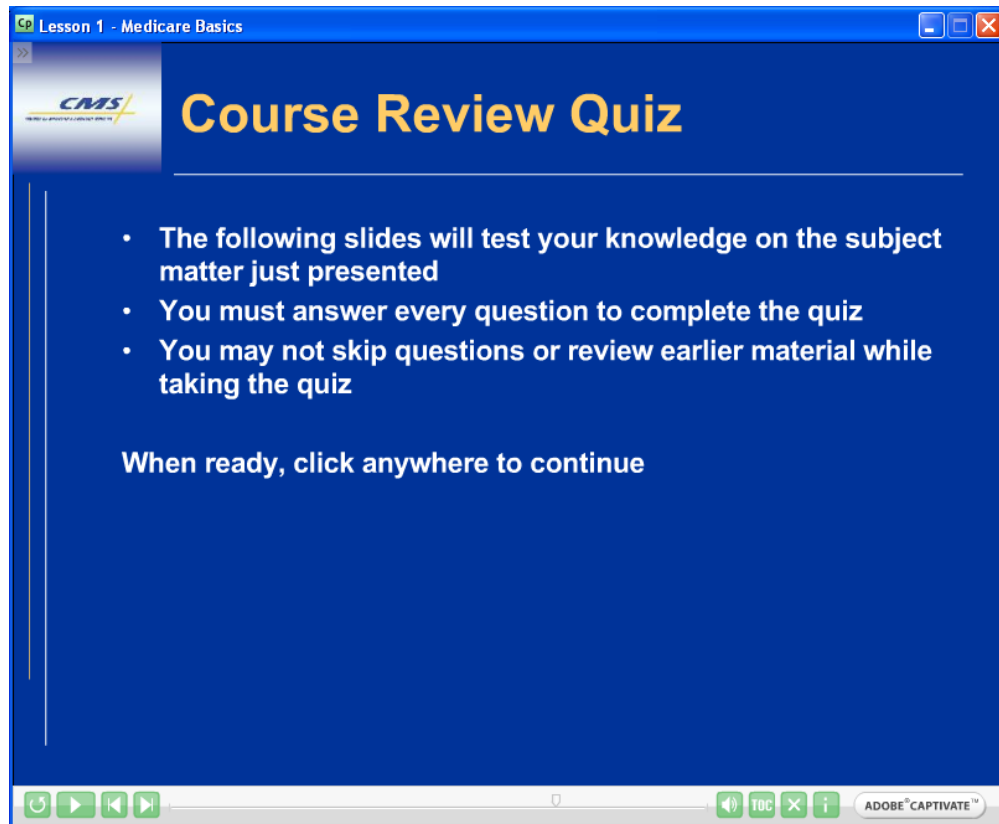


7.5 Course Review Quiz

At the end of each lesson, the user will take a course review quiz. The review quiz is a set of ten randomly selected questions from a larger pool. Review questions cover material presented during the course.

Before the course review quiz begins, the user will see the following preview slide:

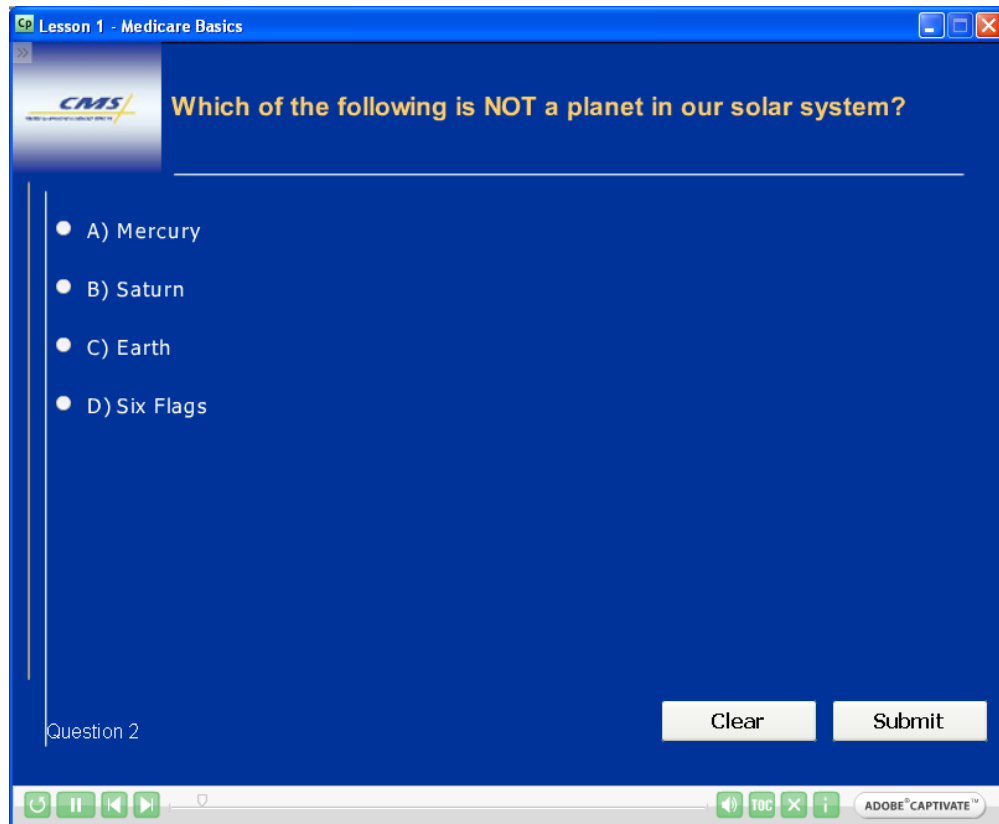
Exhibit 35: Course Review Quiz Preview Slide



The slide offers the user the opportunity to review any previous material in the course before beginning the quiz. Once the user begins the review quiz, navigation to earlier slides is disabled.

The layout of course review questions is as follows:

Exhibit 36: Course Review Quiz Question

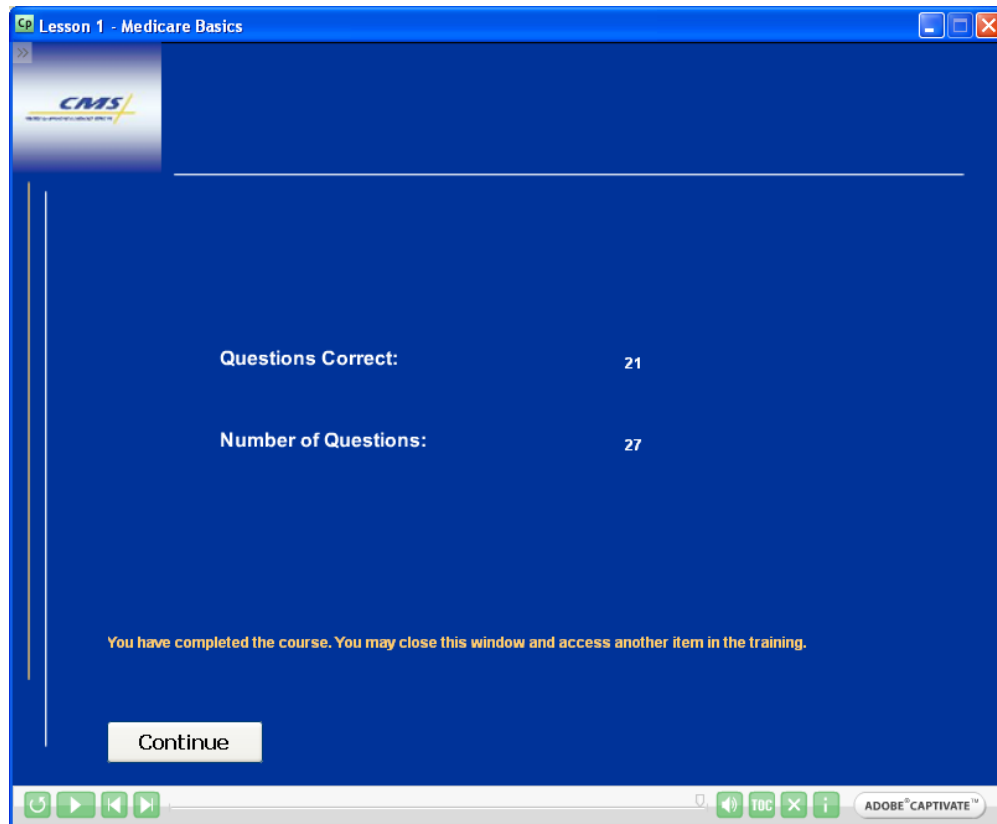


Course review questions utilize the majority of the same settings as Knowledge Check questions:

- The user will not be able to skip questions.
- The system will display feedback messages depending on the answer submitted. Incorrect feedback messages will display additional explanatory text.
- However, during the course review users will only have one attempt to answer a question correctly.

At the end of the course review quiz, the system displays a slide of summary information:

Exhibit 37: Course Summary Slide



As shown above, this slide shows the number of questions (Knowledge Check and Course Review) that the user answered correctly. Additionally, a message is displayed advising the user that the course is complete, and that he/she may close the presentation window and access another item in the curriculum.

7.6 Completing Courses

The user gets credit for completing a course after all questions in the review quiz are answered. After viewing the summary score slide, the user has the ability to close the presentation window and access another item in the curriculum.

Adobe Connect Pro will update the course status on the Curriculum Information page. The course status updates to 'Passed,' and the course button text changes to 'Review':

Exhibit 38: Passed Course Status

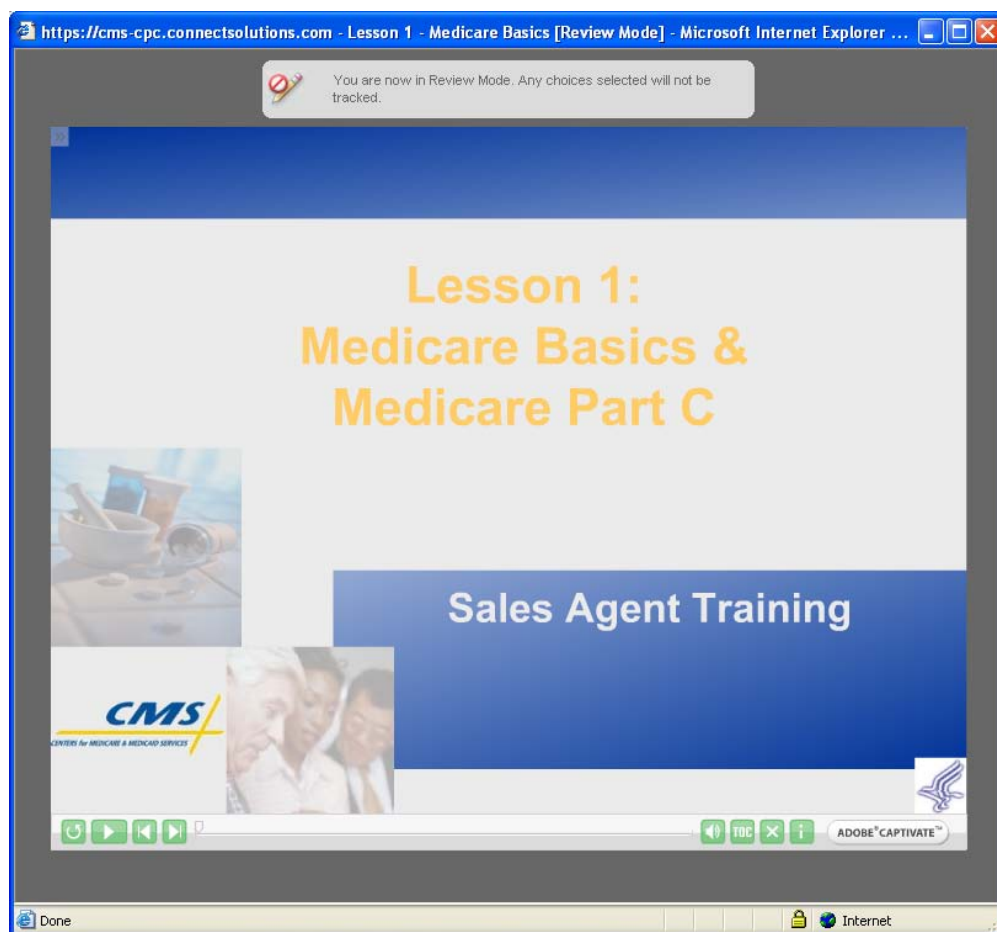
The screenshot displays the 'Agent/Broker Medicare Training' application. On the left, a list of training modules is shown under the heading 'Agent/Broker Mec'. The first item, 'Lesson 1 - Medi', is highlighted with a red box and has a green checkmark icon. To its right is a 'Review' button. Below this list is a 'Legend' section with icons for 'Passed' (green checkmark), 'In Progress' (blue circle with 'i'), 'Failed' (red X), 'Credit Received From Outside' (red 'C..'), 'Prerequisites' (blue circle with 'P'), 'Test-Outs' (blue circle with 'T'), 'Required' (yellow star), and 'Not Required' (red circle with 'N').

The right pane shows the details for 'Lesson 1 - Medicare Basics'. It has tabs for 'Overview' and 'Reports'. The 'Overview' tab is active, displaying the following information:

- Title:** Lesson 1 - Medicare Basics
- URL for Viewing:**
- Course ID:**
- Summary:** This lesson provides background information on Medicare policy and the various Medicare product offerings.
- Max Attempts:** Unlimited
- Duration:** -
- Language:** English
- Status:** Passed (highlighted with a red box)
- Score:** 0/0
- Date Taken:** 07/08/2009 1:31 PM
- Attempts:** 1/Unlimited
- Prerequisites:** This item has no prerequisites.
- Test-Outs:** This item has no test-outs.

When the user completes a course, he/she may still launch the presentation and progress through it again. If the user launches a completed course item, it opens in 'Review Mode.' The presentation window displays the following message: "You are now in Review Mode. Any choices selected will not be tracked."


Exhibit 39: Course in Review Mode





While viewing a course item in Review Mode, any progress or correct/incorrect quiz answers will not be reflected on the Curriculum Information page. For example, if the user opens a completed course in Review Mode, and does not view all the slides before closing the presentation window, the course status will continue to display ‘Completed.’

7.7 Potential Issues

The following items describe scenarios users may encounter while viewing and taking courses in Adobe Connect Pro:

1. I can't move backwards past a question slide
 - ▶ Go to a non-question slide and click the Rewind button in the play bar – takes you to the first slide in the presentation
2. I'm taking course review exam and a blank slide is displayed
 - ▶ Close the window, refresh the curriculum list by clicking the  button (next to the curriculum header on the Curriculum Information Page), open the course again and progress to the appropriate slide

3. I'm taking the course review exam and the question slide does not display the Clear or Submit buttons
 - ▶ Close the window, refresh the curriculum list by clicking the  button (next to the curriculum header on the Curriculum Information Page), open the course again and progress to the appropriate slide
4. I 'clicked anywhere to continue' or pressed the 'y' button after a question, but it didn't move me to the next slide/question
 - ▶ Click the Next button in the play bar
5. Can I have multiple items in the curriculum open simultaneously?
 - ▶ No – the system only allows you to have one item in the curriculum open at a time
6. I accidentally closed the window during a course review quiz. What happens to me?
 - ▶ You can open the lesson presentation again, and click forward until you reach the question slide you were previously viewing
7. I took all the questions in a course review quiz, but when I closed it the status did not update to Passed
 - ▶ Connect may not update immediately due to bandwidth/levels of access. Try refreshing the curriculum by clicking the  button (next to the curriculum header on the Curriculum Information Page).
 - ▶ If that does not work, open the item again and click forwards all the way to the end, then wait a few seconds before closing the window
8. I continued a lesson that I had stopped previously, but I wasn't returned to the last slide I was viewing
 - ▶ You can use the Forward button to return to the last slide viewed. Or, you may drag the progress bar to the last slide viewed

8 Certification Exam

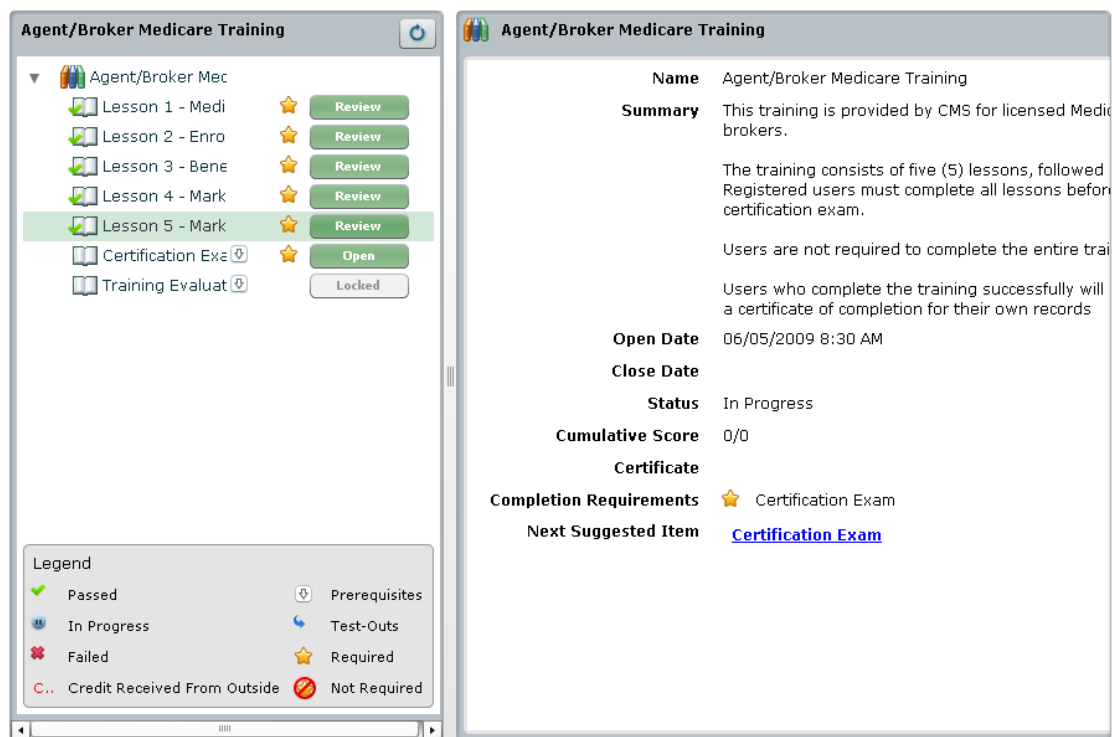
This topic discusses the process of unlocking, accessing and passing the Certification Exam. Successful completion of the Certification Exam allows the user to obtain a certificate of completion for the Medicare sales training curriculum.

8.1 Unlocking the Certification Exam

As discussed earlier, in order to unlock the Certification Exam the user must complete all prerequisite items for the Exam. The Certification Exam will remain unavailable to the user until all five lessons have been completed. At that point, the user will have the ability to launch the Certification Exam presentation:

Exhibit 40: Unlocked Certification Exam

ADOBE® ADOBE® CONNECT™ PRO



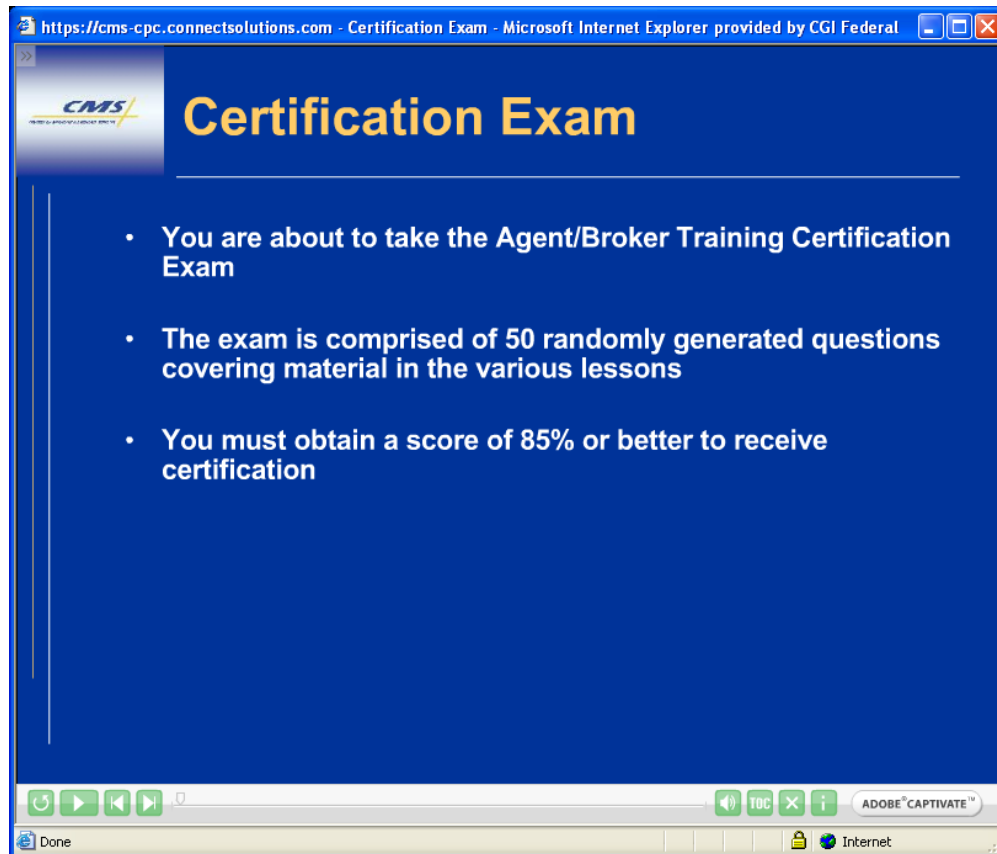
Copyright © 2001 - 2009 Adobe Systems Incorporated and its licensors. All rights reserved.

As with all previous items, the user may launch the Certification Exam by either using the Open button or the Course URL.

8.2 Format of the Certification Exam

After launching the Certification Exam presentation window, the title slide displays. The slides that follow provide high-level information regarding the format of the Certification Exam:

Exhibit 41: Certification Exam Preview Slide



The Certification Exam tests the knowledge and content of all previously viewed curriculum material. Using the same question pools as the five lessons, the exam is comprised of 50 randomly-generated questions (ten per lesson). Users will view the questions in a sequential fashion - i.e., questions from pool 1, 2, and so on.

8.3 Question Layout

Questions for the Certification Exam appear as follows:

Exhibit 42: Certification Exam Question



The Certification Exam utilizes the majority of the same settings as the Course Review questions:

- The user will not be able to skip questions or review previously answered questions.
- The system will display feedback messages depending on the answer submitted. However, the incorrect feedback messages will not display additional explanatory text.
- During the Certification Exam, users will only have one attempt to answer a question correctly.

8.4 Bookmarking during the Exam

Bookmarking is also enabled for the Certification Exam. If the user closes the window prior to completing the exam, he/she will be returned to the last slide viewed when the exam is reopened later.

Adobe Connect Pro will update the course and curriculum status appropriately in the event the Certification Exam is closed prior to completion:

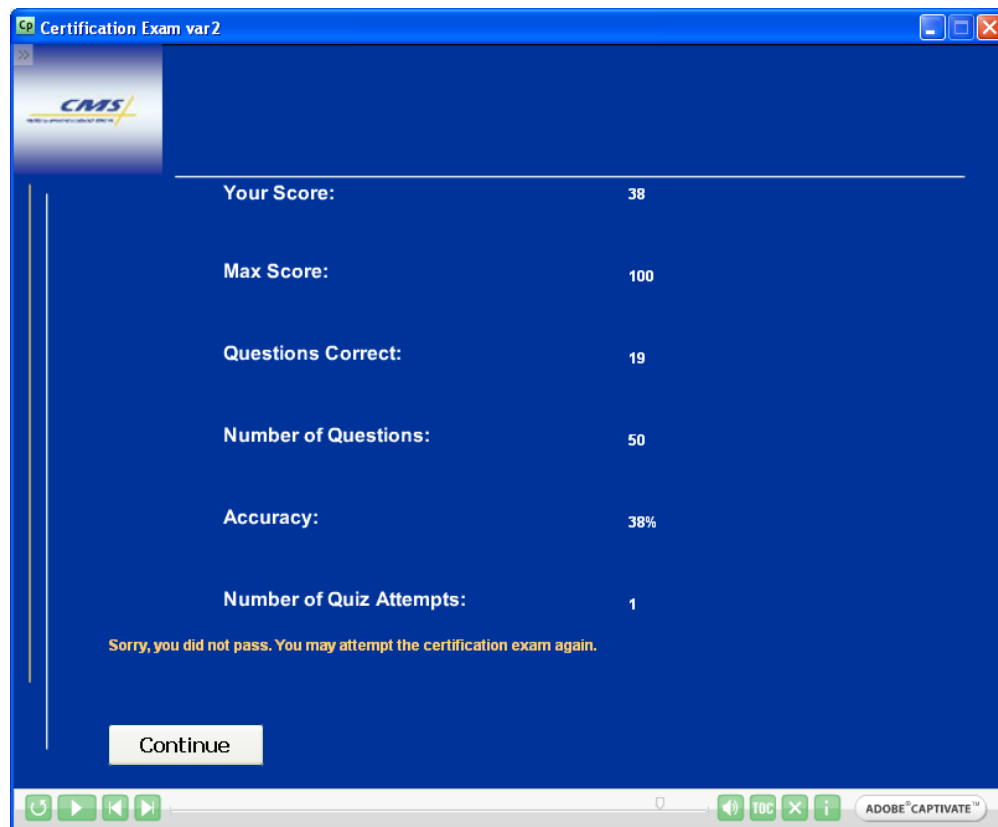
- Exam status updates to 'In Progress'
- The score will display the current score for the most recent session

8.5 Benchmark

CMS requires users to achieve a score of 85% or better to receive credit for completing the Certification Exam. The following scenarios detail what happens when the user fails to meet the benchmark, as well as when the user meets the benchmark.

After answering all questions, the system will display the summary score information for the Certification Exam:

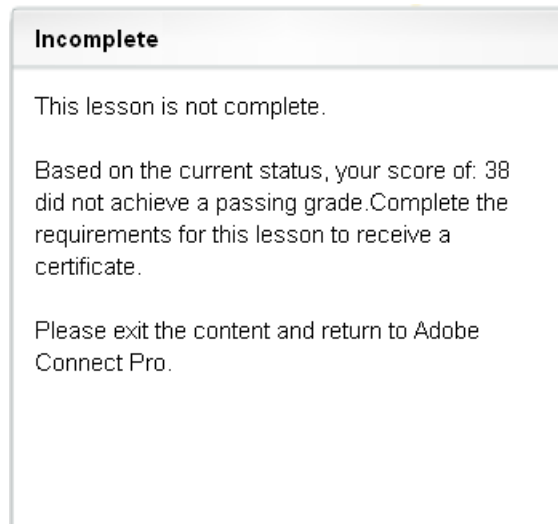
Exhibit 43: Certification Exam Summary Slide



In the event that the user fails to meet the 85% benchmark, the following message will be displayed on the summary slide: "Sorry, you did not pass. You may attempt the certification exam again."

Users who fail to meet the passing benchmark will not be able to view the certificate of completion, which follows the summary score slide:

Exhibit 44: Unavailable Certificate



If the passing benchmark is not met, the user may close the presentation window and launch the Certification Exam again. Adobe Connect Pro will update the summary information on the Curriculum Information page as follows:

- The status of the Certification Exam will display 'Failed'
- The score field will display the most recent score or the highest attempted score to date
- The Training Evaluation survey will remain locked
- Curriculum status will remain 'In Progress' and the Certificate field will remain blank

Users have unlimited attempts to pass the Certification Exam. When the user next launches the Certification Exam presentation, the user will receive a new random set of 50 questions.

8.6 Passing the Certification Exam

If the user meets the 85% benchmark, the following message will be displayed on the summary slide: "Congratulations, you passed. Please go to the next slide to view and print your certificate of completion."

To view and print the certificate of completion, perform the following steps:

1. While viewing the summary score slide, click the Next/Forward button
2. The certificate is displayed as an embedded .swf file. The certificate appears as follows:

Exhibit 45: Certificate of Completion



As shown above, the certificate of completion displays the following:

- CMS Logo
- Curriculum name
- User name
- Date of completion
- Certification Number (for manual entry)

3. Verify that the information displayed in the certificate is correct
4. Click the Print button

When finished, the user may close the presentation window. Adobe Connect Pro will update the curriculum information as follows:

- The status of the Certification Exam will display 'Passed'
- The score field will display the passing score achieved by the user
- The Training Evaluation survey will become available for the user
- Curriculum status will update to Complete

- Certificate field will display a randomly generated certificate number

Exhibit 46: Completed Curriculum Information

The screenshot displays the 'Agent/Broker Medicare Training' interface. On the left, a list of lessons is shown: Lesson 1 - Medi, Lesson 2 - Enro, Lesson 3 - Bene, Lesson 4 - Mark, Lesson 5 - Mark, Certification Exam, and Training Evaluation. Each lesson has a 'Review' button, except for 'Training Evaluation' which has an 'Open' button. A legend at the bottom left explains the status icons: Passed (green check), In Progress (blue circle), Failed (red X), Credit Received From Outside (red C..), Prerequisites (blue circle with plus), Test-Outs (blue circle with arrow), Required (yellow star), and Not Required (red circle with slash).

The right panel, titled 'Agent/Broker Medicare Training', provides detailed information about the training:

- Name:** Agent/Broker Medicare Training
- Summary:** This training is provided by CMS for licensed Medicare brokers. The training consists of five (5) lessons, followed by a certification exam. Registered users must complete all lessons before taking the certification exam. Users are not required to complete the entire training. Users who complete the training successfully will receive a certificate of completion for their own records.
- Open Date:** 06/05/2009 8:30 AM
- Close Date:**
- Status:** Complete
- Cumulative Score:** 98/100
- Certificate:** 29868
- Completion Requirements:** Certification Exam
- Next Suggested Item:** [Training Evaluation](#)

Important Guidance: There is a space provided on the printed certificate for the user to manually write in the Certificate number displayed in Connect. It is **critical** that the user write the Certificate number in the space provided on the certificate for future reference.

8.7 Potential Issues

The following items describe scenarios users may encounter after passing the Certification Exam:

1. I passed the certification exam but I didn't print out the certificate right away, and closed the window. How do I get to see the certificate again?
 - ▶ You will have to access the certification exam again and achieve a passing score on the test. This will not overwrite any data from the previous attempts.
 - It is important to remember to write in the randomly generated Certification Number in the space provided; which will be visible in Connect under the curriculum information.
2. I know I've missed too many questions to pass the exam. Can I close the exam window and restart from the beginning?
 - ▶ No. You must submit an answer to all questions in the exam during a session before you can attempt the exam again.

9 Training Evaluation

This topic discusses the process of taking the Training Evaluation after successfully completing the Certification Exam. The Evaluation is an opportunity for the user to provide valuable feedback on the quality and effectiveness of the curriculum.

All training participants **must complete** the training evaluation upon completion of the curriculum.

9.1 Format

The Training Evaluation survey is a brief assortment of questions designed to gauge the user's opinion on the content, quiz features, and overall impressions of the training curriculum on a scale:

Exhibit 47: Training Evaluation Questions

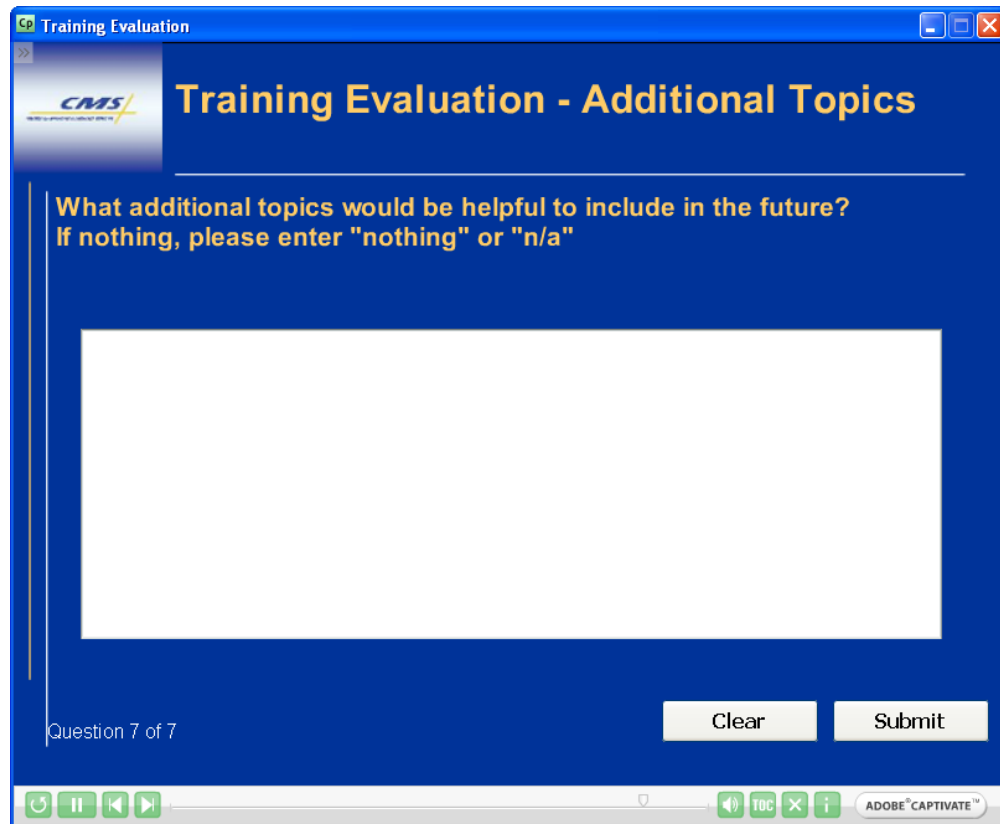
The screenshot shows a web browser window titled "Training Evaluation". The page has a blue background with a yellow header area. The header contains the "CMS" logo and the title "Training Evaluation - Website". Below the header, the text "Provide your feedback for the following statements:" is displayed. There are three statements, each followed by a 5-point scale. The scale is labeled "Very Easy" at the top left and "Difficult" at the top right. The scale points are 1, 2, 3, 4, and 5. Each point has a radio button next to it. The statements are:

- Overall, how easy was the registration process for this test?
- Overall, how easy was it to navigate through the lessons?
- Overall, how easy was it to navigate through the review quiz questions?

At the bottom of the survey, there are two buttons: "Clear" and "Submit". Below the buttons, there is a progress bar and a "Question 1 of 7" indicator. At the very bottom, there is a navigation bar with various icons and the text "ADOBE CAPTIVATE".

The survey also includes a free answer question:

Exhibit 48: Training Evaluation Free Response Question



The screenshot shows a software window titled "Training Evaluation" with a blue background. In the top left corner is the CMS logo. The main title "Training Evaluation - Additional Topics" is displayed in large orange text. Below the title, the question "What additional topics would be helpful to include in the future? If nothing, please enter 'nothing' or 'n/a'" is written in orange. A large white rectangular text input area is centered on the slide. At the bottom left, it says "Question 7 of 7". At the bottom right, there are two buttons: "Clear" and "Submit". The bottom of the window features a navigation bar with icons for back, forward, and search, along with a progress bar and the text "ADOBE CAPTIVATE™".

The user must submit an answer to all questions on a slide in order to proceed. Once a set of answers has been submitted, the user may not go back and change the submission.

To fill out the Training Evaluation survey, perform the following steps:

1. After passing the Certification Exam, the Training Evaluation item will be available in the curriculum drop-down list
2. Launch the Training Evaluation by clicking the Open button or the course URL
3. For each question slide, select a value on the scale for all questions and click the Submit button
4. For the free response question, enter the desired text and click the submit button
5. Note: if you don't have any suggestions or input for the free answer question, enter 'nothing' or 'n/a'

10 508 Compliance

This topic discusses the various features that have been incorporated to meet 508 compliance regulations. The section includes:

- Compatibility with screen reader programs
- Audio prompts/closed captioning

The Helpful Hints section at the end of the topic will provide some useful commands necessary to use the Agent/Broker training.

10.1 Screen Reader Compatibility

There are several items to note when using a screen reader program, such as JAWS, in conjunction with the training curriculum:

- When the user opens a presentation, JAWS will not automatically start reading the contents of the slide. Use the “Ctrl+Home” keys to navigate to the top of the slide and then use the standard JAWS reading commands (example: Up, Down keys) to read line by line the slide contents.
- To navigate through the Courses, tab through the slide and the screen reader will read the course content. Sighted users will see the focus point highlighted in Yellow.
- Using the Tab button on the Navigation bar allows users to forward and go backwards on the slides. Sighted users will see the focus point highlighted in Yellow.
- On question slides – Use the Space bar to select a radio button for the answer. Sighted users will see the focus point highlighted in Yellow.

10.2 Audio Prompts with Closed Captioning

Audio has been added to several features within the training curriculum. Users should ensure that the audio is ‘enabled’ in the Flash Player window after launching a course item.

To assist users, in addition to the visual prompts ,audio prompts have been added to Knowledge Check questions. The following prompts will be generated based on the answers submitted by the user:

- Try again
- Correct. Click anywhere or press ‘y’ to continue
- You must answer the question before continuing (Click on the ‘y’ button to navigate away from this feedback message)
- Incorrect feedback message with the correct answer

For Course Review Quiz questions, in addition to the visual prompts ,the following audio prompts will be generated based on the answer submitted by the user:

- Correct. Click anywhere or press ‘y’ to continue
- You must answer the question before continuing (Click on the ‘y’ button to navigate away from this feedback message)

- Incorrect feedback message with the correct answer

For the Certification Exam questions, in addition to the visual prompts ,the following audio prompts will be generated based on the answer submitted by the user:

- Correct. Click anywhere or press y to continue
- You must answer the question before continuing (Click on the ‘y’ button to navigate away from this feedback message)

10.3 Helpful Hints

Screen reader users may benefit from the following tips:

- Use the “Ctrl+Home” command to navigate to the top of the slide and then use arrow keys to read the slide contents
- Pressing the ‘ESC’ button will close the Flash Player window
- Arrow keys may be used to highlight answer options on question slides
- Pressing the ‘y’ key after any feedback messages will either advance the user to the next slide or remove the feedback message in order to attempt the question again