Statewide Broker Webinar

This webinar will begin at 12:00 PM. If you can see this screen you are prepared to participate.

This webinar is not being recorded, but this PowerPoint will be available on Assister Central

During the webinar, please use the “chat” feature (look for the “chat” image circled below) to submit questions!

September 12, 2019
Open Enrollment Dates!

- Last week, MNsure announced that Minnesotans will have seven weeks – from Friday, November 1, 2019, to Monday, December 23, 2019 – to shop for 2020 health coverage with an effective date of January 1, 2020.

- Minnesota’s enrollment period is eight days longer than the federal open enrollment period that runs from November 1 to December 15.

- MNsure is supplementing the federal open enrollment period with a special enrollment period to give Minnesotans more time to find a health insurance plan that works for them.
Upcoming learning opportunities!
Assister Assembly Conferences

- Day-long conference to provide free in-person training to our assister partners. Lots of very important information!!
- Certified brokers, navigators, CACs, administrators and support staff encouraged to attend. The content will be useful for new and returning assisters!
- Locations (each 9:30 am to 4:00 pm, lunch included):
  - Monday, September 23 – Fergus Falls
  - Thursday, October 3 – Duluth
  - Thursday, October 10 – St. Paul
  - Monday, October 14 – Mankato
- Registration is required (closes one week before each event)
- For more information and to register, visit Assister Central.
Health Insurance Company Webinars

- Health insurance companies offering plans through MNsure will be presenting on their products and services for the 2020 enrollment year.
  - Wednesday, September 11, noon - 1:00 pm: UCare
  - Friday, September 13, 10:15 - 11:15 am: Delta Dental
  - Monday, September 16, noon - 1:00 pm: Medica
  - Tuesday, September 24, 1:00 - 2:00 pm: BCBS of MN
  - Wednesday, September 25, noon - 1:00 pm: HealthPartners

- For more information, the webinar schedule and links to join the meetings have been posted [here](#) on Assister Central.
Broker Agency Management Program (BAMP)
What is BAMP?

- The Broker Agency Management Program (BAMP) is an updated on-line self-service agency management tool for MNsure’s broker agencies.

- BAMP is the way your agency will now:
  - Update staff and agency information
  - Add new staff or inactivate existing staff
  - Make changes to public-facing information on the assister directory
  - Assign and update the agency’s authorized contacts
  - Monitor staff certification and recertification status
Access to BAMP

- Two mandatory authorized contacts and one additional optional contact at your agency may create a BAMP account and manage agency information. The same individual may fill all of the roles:
  - Primary Contact
  - Account Administrator
  - Secondary Contact (optional)
BAMP is Easy to Use!

- It’s easy to add staff, change staff, or change your organization information.
- You can also easily view your staff’s certification and recertification status!

Agency Home — Test Broker Agency, Inc.

What would you like to do?
- Add a new staff member to my roster
- Change a staff member on my roster
- Change Agency or Administrator Information
Setting up Your BAMP Account
Step 1: Initiate an Account

- You will receive an email with instructions for setting up your account shortly after this meeting.

- Go to Broker One Stop, Registration page https://www.mnsure.org/assister-central/broker-one-stop/registration/index.jsp

- Click on the “Create an BAMP Account” box
Step 1: Initiate an Account

- You will need to enter your first name, last name and email address exactly as it was given to you in the email from MNsure.

You can update your name and any other information once your account is created.
Step 2: Validate Your Email Address

- You will receive an email to confirm your email address. You must click on the link in this email before you can log in to your account.
- The email will come from the address “mnsure-no-reply@caspio.com” with the subject: “Email Validation – Broker Agency Management Program (BAMP) account.”
- It may take several minutes for the email to arrive in your account. Be sure to check your spam/junk mail folder before reporting a problem.
Step 3: Log in to Your Individual Account

- Once you have verified your email address, go to the Registration page of Broker One Stop, https://www.mnsure.org/assister-central/broker-one-stop/registration/index.jsp

- Click on the “Login to BAMP” box

  **Registration**
  Broker Agency Management Program (BAMP)
  Online self-service agency management tool for broker agencies who would like to partner with MNSure and begin the certification process for staff.

  - Create a BAMP Account
  - Log in to BAMP

- Enter your email and the password you just created.
Step 3: Log in to Your Individual Account

- You will be taken to the Account Management home screen. Any agency roles you have been assigned will appear under “Your agency accounts and roles.”

- Click on “Manage agency” to sign in to the agency account. If you have multiple roles you may sign in using any role.

**Account Management**
- You must have a validated email address to manage your agency.
- If you manage more than one agency or have more than one role in your agency, you must log out and log in to switch between them.

You may have more than one agency and/or role listed. Click “Manage agency” under the agency and role you want to access.

**Other actions**
- Register a new agency
- Validate your email address
- Change your password
- Log out
Step 3: Log in to Your Individual Account

- Troubleshooting: I logged into my account and there is no role listed under “Your agency accounts and roles.”
  - **DO NOT click on “Register a new agency”**
  - This means you are not currently listed in one of the three authorized roles

- Solution:
  - Someone in your agency that IS in one of the three authorized roles can log in and update the authorized contacts
  - OR - send an email to the Broker Service Line team at brokers@mnsure.org and we will help you with updating your authorized contacts
Step 3: Log in to Your Agency Account

- After clicking on “Manage Agency,” you will be asked to log in again. This is not an error, but a necessary step to ensure you are authorized to access this agency’s information.
- The system will autofill your Agency ID and Role ID and ask you to enter your email and password. Use the same email and password you used to log in to your individual account.

**Troubleshooting:**
If the Agency ID and Role ID field are not auto-filled with values, you will get an error when you try to log in.

If this happens, log in again starting from the “Log into BAMP” button on the Registration page of Broker One Stop.
Step 3: Log in to BAMP

- After logging in, you will land on the Agency Home screen.

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**Agency Home — Test Broker Agency, Inc.**

**What would you like to do?**

- Add a new staff member to my roster
- Change a staff member on my roster
- Change Agency or Administrator Information
Updating Authorized Contacts

- To update your agency’s authorized contacts, click on “Agency Account” from the top menu bar.

- Scroll down the page and click on the “Edit Authorized Agency Contacts” link.

- All fields in this section are required, unless marked optional.
Updating Authorized Contacts

- VERY IMPORTANT: When entering information for an agency contact, be sure to accurately spell their first and last name and use an email address that is unique to that individual.
  - Any individual that is assigned the role of Primary Contact, Account Administrator or Secondary Contact (optional) will have access to BAMP to manage agency and roster information.
  - Once you have added them to BAMP, the individual can create their own BAMP account using the name and email address you entered. They should follow the same instructions we shared in this training.
  - Once they are assigned a role, BAMP will automatically give them access to your agency account based on their role.
  - Any individual no longer in one of the three roles will automatically lose access to managing your agency.
Updating Other Agency Information

- To make changes to your organization legal name, address, phone or website click on “Agency Account” from the Agency Home screen.
- Click on the “Edit Agency Information” link.
- If any fields with an asterisk (*) are blank, you will need to fill them in before you can update your record.
- Note: Any changes you make to your organization name, address or phone number will not automatically be updated for your individual staff members. You will need to update that information in each individual’s record.
Monitor Staff
Information and Status
Monitor Staff Information

- Resolve frequently asked questions:
  - Use BAMP to find out Training IDs and Assister Portal Reference Numbers
  - Use BAMP to check whether staff is listed on the Assister Directory

- Click on “Staff Roster” to view all of this information for your staff
Monitor Certification/Recertification

- Not certified? If the “Certification Status” shows “Not Certified,” click on Staff Training.

- On the Staff Training page, you can see whether the individual has completed all required training. The column will show the date of completion.
Troubleshooting Certification

- No date shown for a required training?
  - If there is no date, the staff member should review their training records in the MNsure Learning Center to verify the course shows as “finished/mastered” in your learning transcript of the broker’s account.
  - If the course does show as “finished/mastered” in your learning transcript, MNsure has not yet updated their record to reflect completion. Please wait at least **five business days** after the individual completed the course before emailing the Broker Service Line to check the status.
Troubleshooting Certification

- All requirements are completed but it still shows as “Not Certified?”
  - Once a week, MNsure reviews all individuals who have met the certification requirements and processes their certification. Please wait at least **six business days** after the individual has completed the final requirement before emailing the Broker Service Line team to check the status.

- We anticipate that BAMP will bring significant improvements to the certification process as more elements of the process become automated. However, at this time, the following steps require manual work by staff and you should expect some processing delays:
  - Setting up training accounts in the MNsure Learning System
  - Updating training completion dates
  - Approving certification and assigning Support Staff IDs
Troubleshooting Recertification

- **VERY IMPORTANT:** All individuals who have not completed recertification are currently showing as “Not certified” in BAMP.
  - As staff completes recertification requirements, their status in BAMP will be updated to “Certified”
  - Although they are listed as “Not certified” in BAMP, their certification does not officially expire until October 31
- To change their status from “Not certified” to “Certified,” staff must have a date in the “OE7 Data Privacy & Security” and the 2020 Assister Portal Training columns. Please wait at least **five business days** after the individual has completed the course before emailing the Broker Service Line to check the status.
Adding Staff to Agency Roster
Step 1: Create a New Staff Member

- Click on “Add a new staff member to my roster” or “Add New Staff link”

- Enter the new staff member’s first name, last name and email address

- Note: The email address must be unique to this individual. BAMP will give you an error if the individual’s email address is already in the system associated with another staff member.
Step 2: Add Certification Information

- After clicking “Submit,” you will be taken to the “View staff member” screen where you can edit this individual’s information.

- Click on “Edit Certification Information”

- Complete all the required fields with an asterisk (*).

- This information should be the information MNsure can use to contact the individual assister.

- Click “Update” when you have completed the section.
Step 3: Add Public-Facing Information

- The public-facing information section must be completed even if the broker will not be listed on the MNsure assister directory.
- Click on “Edit Public-Facing Information”
- Complete all the required fields with an asterisk (*).
- Note:
  - The phone number and email entered here are what will appear to members of the general public in the assister directory. You may choose to enter a central phone number and/or email for the staff member.
  - When selecting counties served by the staff member, only select counties where the staff member is able to provide in-person assistance if requested by a consumer.
  - When selecting languages spoken, you must select at least one language, but make sure you select English if you speak another language in addition.
Step 3: Wait for Training ID to be Activated

- When you add a new staff member to your roster, they will be assigned a randomly generated Training ID. If their “Certification Status” shows as “New,” the Training ID has not been activated.

- Once the staff’s account is set up in the MNsure Learning Center, the individual’s “Certification Status” will change from “New” to “Not certified.” An email notifying the individual that they can begin completing certification training will be sent.

- If a new staff member’s “Certification Status” has changed from “New” to “Not certified,” they can use their Training ID to log in to the MNsure Learning Center.
 Updating Staff Information
Updating Staff Information

- An agency can use BAMP to update any of the following information:
  - Inactivate or reactivate staff
  - Update staff name and contact information
  - Update assister directory listing status and information

- To update staff, from the “Agency Home” screen, click on “Staff Roster” or “Change a staff member on my roster.”

![Agency Home — Test Broker Agency, Inc.]

What would you like to do?

- Add a new staff member to my roster
- Change a staff member on my roster
- Change Agency or Administrator Information
Updating Staff Information

- To edit the information for any individual staff member, click on the “View” link to the left of the name of the staff member.

Staff Roster — Test Broker Agency, Inc.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>NPN</th>
<th>Admin ID</th>
<th>Training ID</th>
<th>Employment Status</th>
<th>Certification Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Ada</td>
<td>1234567890</td>
<td>M27YnJw4Cn</td>
<td>Active</td>
<td>New</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>August</td>
<td></td>
<td>M6cq5VvW2V</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Inactivate or Reactivate Staff

- To inactivate a staff member, or to reactivate a staff member who was previously active, click on “Edit Certification Information” on the “View staff member” screen.

- Select the drop down under “Current Employment Status.”
  - Select “Inactive” to inactivate a staff member.
  - Select “Reactivate” to reactivate a staff member who was previously inactivated.
Inactivate or Reactivate Staff

Select the drop down under “Current Employment Status.”

- Select “Inactive” to inactivate a staff member.
- Select “Reactivate” to reactivate a staff member who was previously inactivated.
Inactivate or Reactivate Staff

- If you are **inactivating** a staff member, do not change any other information. MNsure will take any necessary action to suspend assister portal access and remove the individual from the assister directory.

- If you are **reactivating** a staff member, review all the other information under “Certification Information” and “Public-Facing Information” and update any information that has changed.
Update Assister Directory Information

- To add or remove a staff member from the assister directory, or to change their public-facing information, click on “Edit Public-Facing Information” on the “View staff member” screen.

- Scroll down to section: “List on Assister Directory (Public?), Yes or No.
Update Public-Facing Information

- Information in the “Public-Facing Information” section is used for both the Assister Directory and the Assister Portal.
  - All brokers must complete this section for the Assister Directory and portal access. Information must be entered even if the broker indicates ‘No’ to being listed on the assister directory.

- Information listed here, such as an address, phone number or email, may be different from what is listed for their “Certification Information.”
  - For example, you may choose to enter a central phone number and/or email to direct the public to a central place for screening.
Update Public-Facing Information

- Languages spoken: List any language the individual speaks fluently enough to provide services to a consumer. These language skills will be listed on the Assister Directory. Be sure to select English if you also speak another language fluently.

- Counties served: List all counties where the individual is able to provide in-person assistance to a consumer. (Future: Consumers will be able to search by counties to find assisters serving their area.)
Resources

- Detailed instructions on using BAMP are available on Broker One Stop on the Registration page
  https://www.mnsure.org/assister-central/broker-one-stop/registration/index.jsp

- If you have questions or problems creating your BAMP account, send an email to brokers@mnsure.org with any related screen shots
Questions?
Recertification and Certification for Open Enrollment (OE) 2020
OE7 Recertification

- Recertification training is launching this week. An email will be sent with your Training ID (Unique ID) when coursework is available in Your Learning Path Summary in MNsure’s online learning management system.

- All brokers must complete certification prior to the start of open enrollment

- Complete by **Monday, October 28** to avoid certification suspension
  - Must complete recertification to continue to have access to the assister portal and for consumers to associate with brokers via the portal with assigned reference number
  - You will no longer be authorized to assist consumers with the application and enrollment process
  - You will no longer have access to Broker Line services
  - Your access to the assister portal will be suspended
  - Brokers will be removed from the online Assister Directory

- Suspended brokers will be able to reactivate their certification after the date of their suspension by completing all outstanding recertification requirements
OE7 Recertification

- Required Coursework
  - New! MNsure Assisters Data Security, Accessibility, Compliance and Ethics (1 CE)
    - MNsure Assister Data and Security
    - MNsure Assisters Accessibility, Compliance and Ethics
    - MNsure Assister Data Security, Accessibility and Compliance Assessment
  - New! MNsure Assister Portal (1 CE)
    - MNsure Assister Portal
    - MNsure Assister Portal Assessment

Must achieve a score of at least 80% on the knowledge assessment for each course
OE7 Recertification

- Optional coursework available for review and CE
  - New* Core Curriculum will have updates to existing content but not a new course (2 CE)
  - 2018 Role-based Curriculum for Assisters (2 CE)

*No credit will be earned if the licensee has previously received credit for the same course during the same licensing period

- The Training ID/Unique ID to access training will be sent to currently certified brokers. If you have your training ID/Unique ID already, then you can begin training now.
OE7 Recertification

- If you would like to confirm completion of coursework it can be viewed in MNsure’s online learning management system under “your learning transcript” or your designated agency administrator can look up training completions in the Broker Agency Management Program (BAMP).

- If you encounter problems completing the training, send an email (include details and screen shots, if appropriate) to brokers@mnsure.org.
Tips for a Successful Experience

- The courses are timed, so you will need to wait for a “next” button to appear to advance the content.
- Screens that include links have a longer minimum screen time to give you a chance to click and explore the content.
- In order to get credit for completing the course, you will need to participate in the interactions included in the course. For example, be sure to answer the “Check Your Understanding” questions asked within each course.
- If you need to take a break, be sure to “close” the course. If you let the course time out due to inactivity, it will stop recording your progress and you may need to restart that course to get credit for completion.
- The final assessment is at the end of the series, rather than after each individual course.
- Refer to the tip sheet, “How to Access the MNsure Learning Center,” for detailed instructions on how to locate and complete the courses.
OE7 Certification

- Available Now!

- Required Coursework for new brokers
  - MNsure Assisters Data Security, Accessibility, Compliance and Ethics (1 CE)
  - New! Core Curriculum (2 CE)
  - 2018 Role-based Curriculum for Assisters (2 CE)
  - New! MNsure Assister Portal (1 CE)

Must Achieve a score of at least 80% on the knowledge assessment for each course
Registration

- Be sure to log in to MNsure’s updated Broker Agency Management Program (BAMP) tool to make updates to broker contact and directory information as well as add any new staff.

  - All agencies must create a new account in BAMP to update staff roster information. We have some new requirements this year and this information must be entered for every staff member on the roster in order to complete recertification or certification requirements.

    - Insurance license expiration date
    - Counties served
    - Languages spoken (must be fluent enough to assist a consumer with their health insurance needs)
    - Data Privacy and Security questions
New this year: Training for Broker Support Staff

- We recognize that support staff other than the AOR at broker agencies may need to contact MNsure.

- Support staff who will be contacting MNsure will be required to complete the following:
  - Data Privacy and Security
  - MNsure Accessibility Compliance and Ethics
OE7 Recertification Resources

- Assister Central/Broker One Stop
  - Certification and Recertification page
  - Registration
    - [https://www.mnsure.org/assister-central/broker-one-stop/registration/index.jsp](https://www.mnsure.org/assister-central/broker-one-stop/registration/index.jsp)
  - Training Access
    - [https://www.mnsure.org/assister-central/broker-one-stop/cert-recert/training-access/index.jsp](https://www.mnsure.org/assister-central/broker-one-stop/cert-recert/training-access/index.jsp)
- Policy and Procedure
New Shopping and Enrollment Platform for this Open Enrollment
New online enrollment platform

- MNsure’s new shopping and enrollment platform will be live for consumers and assisters when open enrollment starts on November 1
  - New platform will be used to enroll in coverage effective January 1, 2020 or after
  - Consumer’s with a special enrollment period (SEP) seeking 2019 coverage will need to call MNsure to manually enroll
New online enrollment platform

- New platform features a consumer dashboard with access to:
  - QHP-specific notices (eligibility notices will still be in METS)
  - Plan enrollment information (confirmations) for 2020
  - Ability to take actions, such as adjusting APTC and cancelling plans
- Improved visual experience – no more window-in-window when shopping and enrolling!
- New functionality will improve the back-end process, allowing MNsure staff to provide better enrollment support:
  - Contact Center staff will be able to see consumer’s dashboard, providing better information about what consumers are experiencing
  - Starting for plan year 2020, enrollments previously handled manually will be automated with information going to carriers same day
Welcome, Erick Mills

My Stuff
- My Dashboard
- My Eligibility History
- My Enrollments
- My Inbox

2020

Open enrollment period ends on 12/15/2019. You have 41 days to enroll in plan. If you are reporting a change on your current year's enrollment, please click on the 2019 tab to complete your enrollment.

NEXT STEPS
You have successfully completed your application for health insurance and provided your financial information. You can now compare and shop for medical and dental plans.

SHOP FOR PLANS

Overview
Your Application Status
2020 Application Complete
For 1 members

Your Household Eligibility
Erick Mills Advanced Premium Tax Credit
$191.69 per month Eligible for cost-sharing reductions
 Eligibility Details View Details

Your Medical Plans
You will be able to see your medical plans here once you have completed plan shopping.

Note: Screen shot is from test environment and may differ from what you'll see when platform goes live.
Consumer inbox

Back to Dashboard

Notifications 4 items in Inbox; 3 unread

<table>
<thead>
<tr>
<th>From</th>
<th>Subject</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>MNsure</td>
<td>Re: ACTION REQUIRED: Receipt of Application</td>
<td>Thu Dec 12</td>
</tr>
<tr>
<td>MNsure</td>
<td>Re: ACTION REQUIRED: Receipt of Application</td>
<td>Thu Dec 12</td>
</tr>
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</table>

Note: Screen shot is from test environment and may differ from what you'll see when platform goes live.
Plan comparison screen

Note: Screen shot is from test environment and may differ from what you’ll see when platform goes live.
APTC adjuster tool

Your federal tax credit

To choose how much of your premium tax credit you would like to use towards your monthly premium, move the slider and click "Confirm".

Monthly APTC Amount
$102.38 $ 29.21

APTC Effective Date: 01/01/2020

How did we come up with this amount?

- The premium tax credit listed here is an estimate based on the estimated annual income you provided on your application.
- The amount of premium tax credit you'll actually receive will be based on the income you declare in your 2020 tax return.
- If your actual income on your 2020 tax return is higher than the estimate you provided on the application, you might end up qualifying for a smaller tax credit - or no tax credit at all.

Note: Screen shot is from test environment and may differ from what you’ll see when platform goes live.
Terminate plans

Are you sure you want to disenroll from your health coverage?

If you are receiving another health plan, you may not be able to return to the current plan at the end of the current benefit period.

Select Your Last Day of Coverage:

- Last day of the current month (May 31, 2020)
- Last day of next month (June 30, 2020)
- Last day of the subsequent enrollment period

Confirm Your Last Day of Coverage

You have chosen June 30, 2020 as your last day of coverage from Peak Individual $3000 Plus Silver 2020T

Note: Screen shot is from test environment and may differ from what you’ll see when platform goes live.
Enrollment confirmation

Welcome, Khaleesi Selenium

My Stuff
- My Dashboard
- My Eligibility History
- My Enrollments
- My Inbox

2020

NEXT STEPS
You are currently enrolled in medical and dental coverage. If you would like to report a change in income, household members, or something else please click the ‘REPORT A CHANGE’ button below.

REPORT A CHANGE

Overview

Your Application Status
2020 Application
Complete

Your Household Eligibility
Khaleesi Selenium
You are not eligible for advanced premium tax credits or cost-sharing reductions

Your Medical Plans
HealthPartners
Peak Individual $3000 Plus Silver 2020T
Terminated

Your Dental Plans
Dentegra
Dentegra Dental PPO Family Basic Plan 2020T
Pending

Note: Screen shot is from test environment and may differ from what you’ll see when platform goes live.
AOR improvements in 2020

- Beginning with 2020 enrollments and renewals, AORs generated through the Assister Portal will be transmitted to the carriers along with the enrollment files via electronic data interchange (EDI)
  - Transmission with enrollment files means:
    - AOR files will be transmitted from MNsure to the carriers daily instead of weekly
    - No more issues with primary insured vs. household members
AOR improvements in 2020

- Beginning with 2020 enrollments and renewals, AORs generated through the Assister Portal will be transmitted to the carriers along with enrollments via EDI.
  - Transmission of AORs via EDI will expedite AOR processing at MNsure and carriers
    - AORs will be uploaded into carriers’ systems
    - Fewer manual steps at MNsure
    - Fewer manual steps for carriers
New AOR Process

- In order to make the AOR process work:
  - AORs will need to be reported via the Assister Portal
    - Exception process for:
      - Retroactive AORs
      - Paper applications
Upcoming Communications

- MNsure has emailed brokers who associated with their clients using the electronic AOR form rather than the portal.

- Brokers have been instructed to contact these clients in order to make the association on the Assister Portal. This will ensure that the broker’s AORs will be transmitted along with 2020 passive renewal files.
Certified brokers are given access to MNsure’s assister portal once assister portal training has been completed.

If you have not done so already, please log into the Assister Portal dashboard now to make sure you are successfully able to access your account.

If you are unable to access your account, please send a screenshot of the message received and your assister portal username to the broker service inbox at brokers@mnsure.org.
Thank you!

Use #6 to unmute your line and ask a question. Remember to state your name and organization. Use *6 to remute your line when you are done.