

Administrative/Broker Staff Certification Training

This program provides basic information for those who assist a Broker or agency (but are not licensed). This curriculum includes an overview of the Marketplace, Colorado Connect, Broker Portal management and our required compliance training.

Training Hours: 4 hours

The Affordable Care Act (ACA) Overview

This document summarizes the Affordable Care Act (ACA), including consumer protections, health insurance marketplaces, and health insurance options for small businesses.

Connect for Health Colorado Overview

This document summarizes Connect for Health Colorado's partners and function.

Health Insurance Types Reference Guide

This document summarizes the different types of plans have different rules, especially about the providers they pay and how customers access care. This guide will provide an overview of the different types.

Health Insurance Industry Tiers and Terms Reference Guide

Understanding insurance industry basics will enable you to help Connect for Health Colorado achieve its mission to increase access, affordability and choice for individuals and small employers purchasing health insurance in Colorado.

Broker Portal Role Permissions Reference Guide

This flowchart will help you understand your Broker Portal role and what permissions are available to you.

Certified Broker Account Creation and Profile Completion in the Broker Portal

This video demonstrates how to create a new Broker Portal account or login to your Broker Portal account. **Estimated time: 6 min**

Managing Authorized Users and Account Creation for Administrative Staff in the Broker Portal

This video will differentiate Administrative Staff Broker Portal accounts and Certified Broker Portal accounts; Navigate the Authorize User screen in the Broker Portal; and assist an Authorize User on how to create an Administrative Staff Broker Portal account. **Estimated time: 6 min**

Managing Associated Brokers in the Broker Portal

This video will navigate the Associated Broker screens in the Broker Portal. **Estimated time: 3 min**

Managing Client Lists in the Broker Portal

This video will navigate the Client Information screens in the Broker Portal and describe the book of business details. **Estimated time: 5 min**

Marketplace Fraud Overview

This document summarizes examples of Marketplace Fraud and the reporting parties.

The Americans with Disabilities Act (ADA)

This online course will: Define what the ADA is and recognize how the Act defines disability; Identify the legal requirements for supporting people with disabilities in your role with Connect for Health Colorado; Describe the ACA impacts Americans with disabilities and Connect for Health Colorado's policy on auxiliary requests; Provide helpful tips for interactions and working with people who have disabilities; and describe effective communication techniques. **Estimated time: 20 min**

Security Awareness (Part 1-7)

This online course will: Review the importance of security; Explain the effects of security on customers; Describe what a "Human Firewall" is and why it is important; Explain how the Security and Privacy program meets requirements to protect customer data; Share signs of a potential Insider Threat; Review access controls; Explain password guidelines; Describe the various types of Malware; Review the importance of using care on social media; Defining Personally Identifiable Information and Protected Health Information; Define social engineering; Explain phishing attacks; Share how to avoid scams; Describe the importance of email security; Define the role of encryption; Explain how to identify suspicious emails; Review PII in emails and instant messaging; Describe the frequency of system back ups; Explain the appropriate security measures with data disposal and encryption; Review shredding requirements based on specific IRS Publications; Explain the steps taken to protect mobile devices; Describe the storage for mobile devices; Review the importance of using a Virtual Private Network (VPN) to ensure security; Explain how a security breach occurs; and share the steps taken to report security incidents. **Estimated time: 105 min**

Personally Identifiable Information and Protected Health Information (PII/PHI) (Part 1-5)

This online course will: Describe legal requirements and how to protect customers' PII and PHI; Define PII; Share examples of PII; Describe the Privacy Laws; Explain the compliance requirements under the Health and Human Services Regulations; Share how to protect the flow of data under the Fair Information Practice Principles; Explain the consequences of disclosing customer information; Define non-compliance violations and penalties; Share best practices for protecting customer's information; Review what is included in PHI; Describe the rules of De-identification; Explain various forms of PHI; Describe an overview of HIPAA; Review the specifics of Protected Health Information; Explain the Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule; Clarify who must comply with the HIPAA Rules and the liability for non-compliance; Describe the role of the Office of Civil Rights (OCR); Explain the role of state and local compliance; Define the enforcement of HIPAA; Explain what is and is not considered a breach; Share how Colorado Laws view data breaches; Describe a security incident and reporting requirements; and share Security Practices. **Estimated time: 70 min**

Broker Portal Approval Process Reference Guide

This guide outlines your next steps after completing the Broker/Agent Certification training and explains how the approval process works.