

**Medicare Sales
Training and Certification
User Manual
v2**



Medicare Sales Training and Certification Modules

Gorman Health Group Medicare Sales Training and Certification Program provides agents and brokers with in-depth explanations of the Medicare Advantage (Part C) and Medicare Prescription Drug (Part D) programs, including benefits, enrollment processes and procedures, appeals and grievance processes, and other areas that agents must be well versed in. Each training program contains three modules, each of which includes a series of pre-quiz questions and a final exam:

Module	What's Covered
Module 1: Health Plan Specific Information	Includes a pre-training quiz, customized explanations of individual health plan history, benefits, rules, Medicare enrollment process, and an exam.
Module 2: Medicare Basics	Includes a pre-training quiz, explanations of Medicare Parts A and B, Medicare Managed Care (Part C), The Medicare Modernization Act, and Medicare Part D (prescription drug coverage), and an exam.
Module 3: Medicare Marketing and Enrollment	Includes a pre-training quiz, discussion of Medicare Managed Care Election Periods and Eligibility, CMS Marketing Guidelines and Ethics (including required and prohibited marketing activities), Provider Marketing Rules, and an exam.
Final Exam	Comprehensive exam covering materials explained in Modules 1, 2, and 3.

Rigorous Testing and Certification Requirements: To proceed to the next module, participants must first pass the exam given at the end of the previous module. Additionally, participants must also pass a comprehensive final exam. Upon entering this final exam, participants may not go back to review the preceding modules. To receive certification, participants must pass with a minimum score as established by the plan.

Resources and Reference Tools: During the training, participants will have access to critical reference documents, including a glossary of terms, frequently asked questions, CMS enrollment and disenrollment requirements, the CMS Marketing Manual, plan summary of benefits, and evidence of coverage.

I. Accessing the URL

To access the training, you must first register to receive a username and password. The Registration URL (or web address) must have been distributed and received electronically via email. The URL must not be distributed via hard copy. (See Sample URL Distribution Email)

1. The URL must be opened or entered into an Internet Window Address Bar in its entirety to work properly. This can be done by clicking on the electronically received link using the computer's mouse.
2. If the URL link does not open:
 - a. Hold down the 'CTRL' key on the keyboard while clicking on the distributed link, or
 - b. Using the mouse, **highlight the entire link**, click the **right mouse button**, and select **'copy'** from the pop-up window. Open Internet Explorer, click the right mouse button and select "paste" into the Address Bar, then press 'enter' on the keyboard.

Sample of URL Distribution Email:

To all Agents:

The link below will take you to the online training we developed for the 2007 contract year. Under new Federal guidelines, all agents must be trained and tested with all the information in the modules.

To access the training, you must first register to receive a username and password. Use the computer's mouse and click on the Registration URL (web address) listed below. The URL must be opened or entered into an Internet Window Address Bar in its entirety to work properly. When clicking on the link, if the URL does not open the Registration page in an Internet Window:

- hold down the 'CTRL' key on the keyboard while clicking on the link, or
- using the mouse, highlight the entire link, click the right mouse button, select 'copy' from the pop-up window, paste the copied link into an Internet Window Address Bar, then press 'enter' on the keyboard.

Registration URL (web address)

<http://www.brainshark.com/gormanhealth/signup.aspx?c=#####&g=#####>

<http://www.brainshark.com/gormanhealth/signup.aspx?c=#####&g=#####>
CTRL + click to follow link

There are three modules and each module has an exam at the end. There is also a final exam that encompasses all three modules. You must pass each exam with a score of XX% or better.

In order to start selling the [Health Plan Name] product on [Date], you must complete all three modules and receive passing scores on all exams by [Date].

If you have any questions about the training please contact [Plan Contact] at (XXX) XXX-XXXX. We recommend that you print the Summary of Benefits from the attachments page in the training before you start. You will need them.

If you have any technical issues please contact **Customer Support Department at (XXX) XXX-XXXX** for troubleshooting assistance.

II. Registration Page

http://www.brainshark.com/gormanhealth/signup.aspx?c=#####&g=#####

GORMAN HEALTH GROUP MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM

Welcome to Gorman Health Group's Medicare Sales Training and Certification Program!

Already registered? Click **Login** to continue your course.

To begin the training and certification program, please fill in the information box on the right and click **Submit**.

Sales Training & Certification User Manual

CMS Part C and Part D audit guidelines require that all employees and independent agents who approach Medicare beneficiaries be trained and tested in the Medicare program, on health plan benefits and procedures, and on the federal marketing requirements. Medicare plan sponsors whose employees or agents act outside these parameters risk hefty federal sanctions and having their reputations tarnished.

Gorman Health Group – the industry leader in Medicare sales agent compliance and monitoring – offers a practical solution: **GHG's Medicare Sales Training and Certification Program**. This comprehensive, computer-based training program has been developed by the nation's leading Medicare marketing compliance experts. GHG's Medicare Sales Training and Certification program demonstrates to CMS that your plan has trained and tested the individuals who sell your product. This in turn demonstrates to CMS a commitment by your plan to promote best sales practices among your employees and outside sales agents.

Medicare plan sponsors can utilize this state-of-the-art, web-based program to train, test, certify, and monitor independent agents located remotely.

First Name:

Last Name:

Company:

[Plan Name]

License #:

Title:

Phone:

Email:

Confirm Email:

Submit

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a. Complete the registration boxes on the right of the screen.

NOTE: Required fields (*) include First Name, Last Name, Email, and Confirm Email. (We highly recommended that you provide a Phone Number.)

Click 'Submit' to go to the 'Login Page' where you will receive your username and password.

First Name:

Last Name:

Company:

License #:

Title:

Phone:

Email:

Confirm Email:

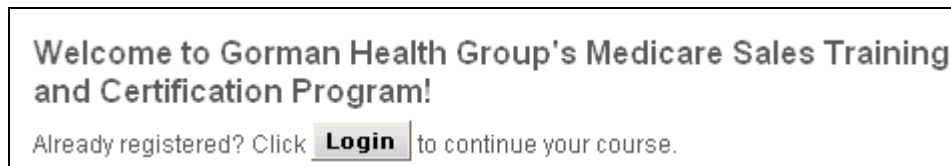
Submit

b. Link for the User Manual



c. Already Registered [Login]

When you want to log back into the training, do not re-register by completing the boxes on the right. Instead, click on the link 'Login' that states ***"Already registered? Login to continue your course."*** This will take you to the login page where you can enter the username and password you were provided.



III. Log-In Page

- a. The first time you are taken to the Login Page after registration, the screen will provide your Username and Password.
 - i. Your Username is your email address PLUS an added number (6 digits).
 - ii. Your password is a randomly selected confidential set of numbers and letters that are case sensitive.

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MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM

Thank you for registering with GHG's Medicare Sales Training and Certification Program.

Your username is: **johnsmith@email.com123456**
Your password is: **E4SVJ2 (case sensitive)**

This information will also be sent to your registered email address.

User Name

Password

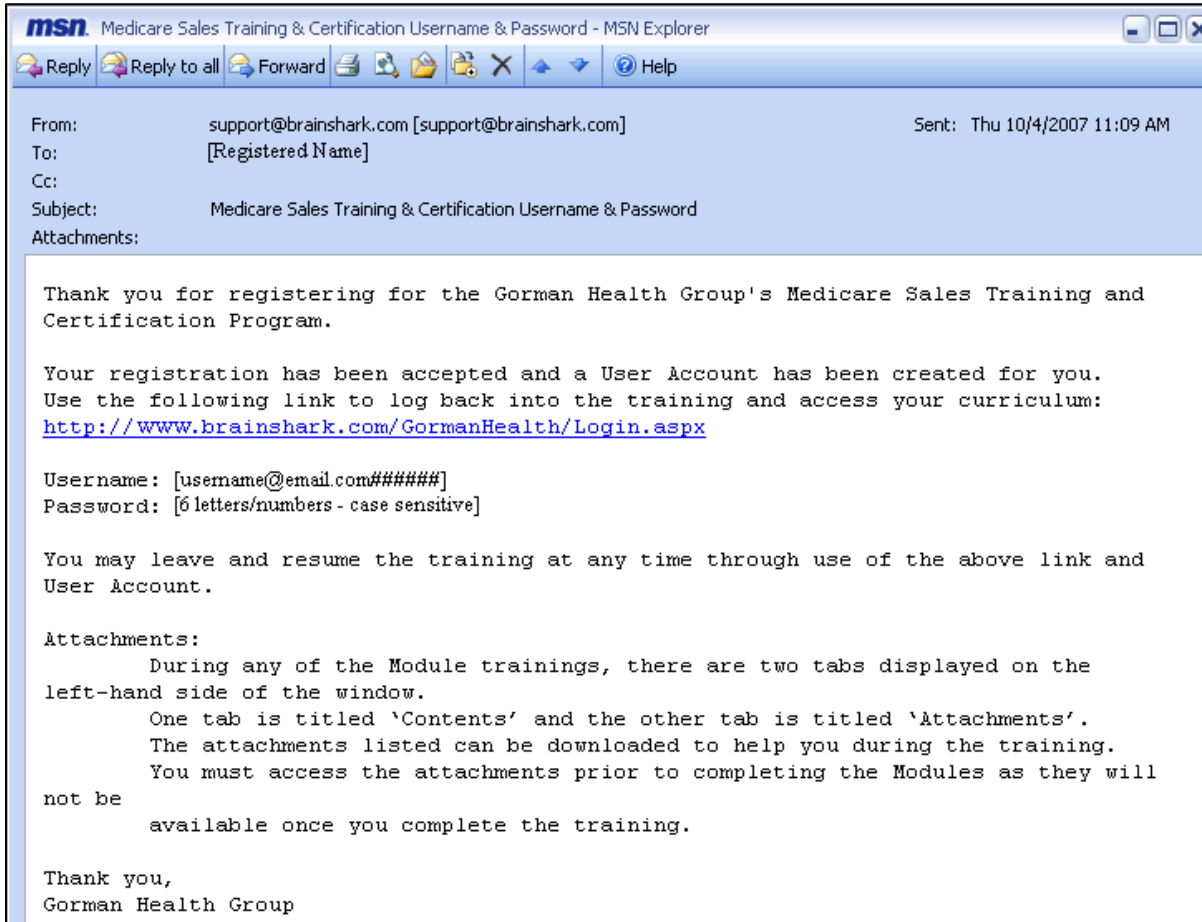
Login

Sales Training & Certification User Manual

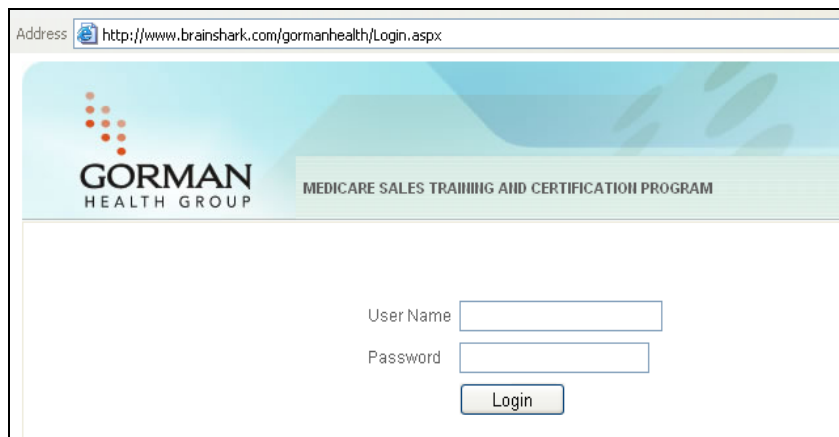
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- iii. Username and Password will also be emailed to the email address used to register from support@brainshark.com - Keep this email – DO NOT DELETE.



- b. When logging back into the training the Login screen will not provide your username and password. You will have to access this information from the email you received from support@brainshark.com.



IV. Select Certification

After you have successfully logged-in, choose the MAPD or PDP Curriculum.

a. MAPD or PDP

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SELECT CERTIFICATION

Select certification:

MA-PD Certification

Gorman Health Group's MA-PD Certification Program is designed to train Sales Agents in specific Health Plan benefits, Medicare benefits, and sales and marketing regulations. Module 1 is specific to the health plan's enrollment procedures and benefits. Module 2 provides information regarding Medicare Part A, Part B and Part D. Module 3 provides information regarding the Federal Government's sales and marketing regulations.

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If this screen does not provide a certification to select and is blank, you must contact the **distributing department as your registration is incorrect.**

You will need to re-register using the correct URL.

V. Curriculum Page

- a. The Curriculum Overview page will guide you through the order in which the courses are to be taken via the active link on the page.

http://www.brainshark.com/gormanhealth/Home.aspx?c=Z2hnJDEwNjg5JG15QG1zbi5jb20yMTkxMDJkMTE1Mjg

GORMAN HEALTH GROUP MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM [Logout](#)

Welcome to the Gorman Health Group Sales Training and Certification Program. The modules and exams shown below must be taken in order. Click on the course title (module or exam) link to begin viewing the material.

Thank you and good luck.

Click **Refresh** to update the curriculum chart.

Course Title	Duration	Status	Score
CIP MA-PD M1: Plan-Specific Information	00:54:03	Enrolled	
CIP MA-PD M1 Exam V3	00:00:34	Enrolled	
CIP MA-PD M3: Marketing & Enrollment	00:24:29	Enrolled	
CIP MA-PD M3 Exam V2	00:00:34	Enrolled	
CIP MA-PD M2: Medicare Basics	00:30:12	Enrolled	
CIP MA-PD M2 Exam V1	00:00:34	Enrolled	
CIP MA-PD Final Exam V2	00:00:42	Enrolled	

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- b. Click “refresh” to update curriculum chart or intranet page if settings have been changed.

http://www.brainshark.com/gormanhealth/Home.aspx?c=Z2hnJDEwNjg5JG15QG1zbi5jb20yMTkxMDJkMTE1Mjg

GORMAN HEALTH GROUP MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM [Logout](#)

Welcome to the Gorman Health Group Sales Training and Certification Program. The modules and exams shown below must be taken in order. Click on the course title (module or exam) link to begin viewing the material.

Thank you and good luck.

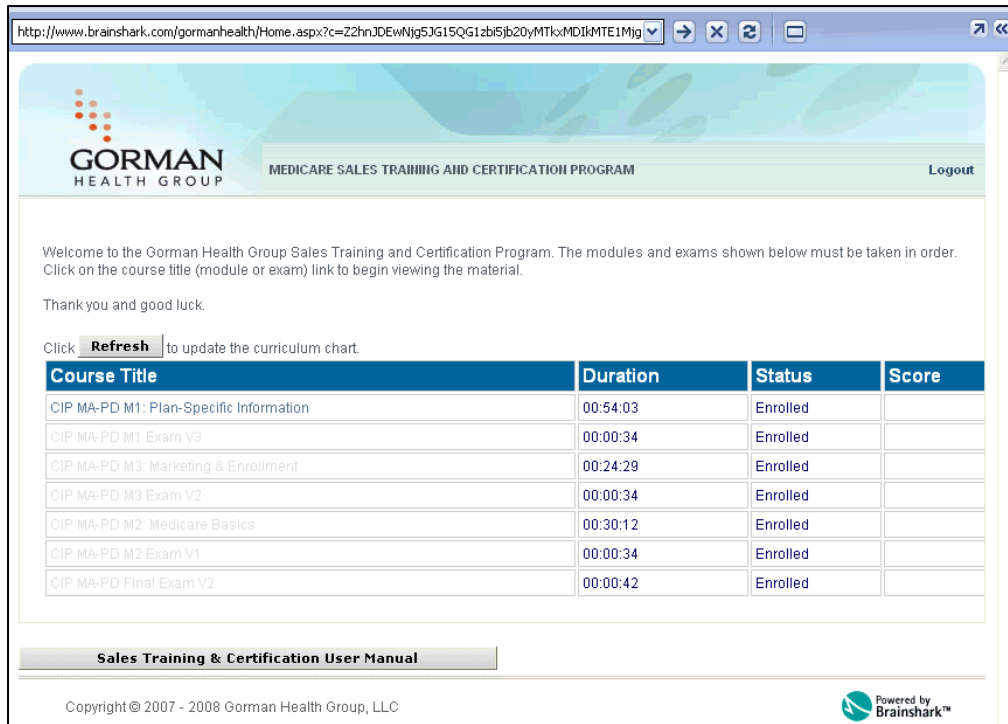
Click **Refresh** to update the curriculum chart.

Course Title	Duration	Status	Score
CIP MA-PD M1: Plan-Specific Information	00:54:03	Enrolled	
CIP MA-PD M1 Exam V3	00:00:34	Enrolled	
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CIP MA-PD M2 Exam V1	00:00:34	Enrolled	
CIP MA-PD Final Exam V2	00:00:42	Enrolled	

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c. Click on the active Course Title link:



http://www.brainshark.com/gormanhealth/Home.aspx?c=Z2hnJDEwNjg5JG15QG1zbi5jb20yMTkxMDIiMTE1Mjg

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MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM

Logout

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Click to update the curriculum chart.

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CIP MA-PD M2 Exam V1	00:00:34	Enrolled	
CIP MA-PD Final Exam V2	00:00:42	Enrolled	

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TROUBLE SHOOTING INFORMATION

1. If link does not open when clicked, hold ctrl key on keyboard while selecting the course title.
2. If link still doesn't work, check your pop-up blocker site.
3. If link still doesn't work, contact **distributing department** for assistance.

VI. Module Window

The screenshot displays a web browser window with the URL <http://www.brainshark.com/gormanhealth/Home.aspx?c=Z2hnJDEwNjg5JG15QG1zbj5jb20yMTkxMDIkmTE1Mjg>. The browser shows a Gorman Health Group training module titled "CIP MA-PD M1: Plan-Specific Information". The module is presented in a window titled "Plan-Specific Information - MSN Explorer" and is powered by Brainshark. The main content area features the Gorman Health Group logo and the text "GORMAN HEALTH GROUP TRAINING in conjunction with MA-PD Sales Training and Certification Module 1: Plan-Specific Information". A table of contents is visible on the left side of the module window, listing various sections and their durations. The bottom of the module window shows a progress bar indicating "Slide 1 of 102" and a timer showing "0:04 / 0:53". The background of the browser window shows a Gorman Health Group website with a "Refresh" button and a "Course Title" dropdown menu.

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Brainshark™

a. Additional Module Window Features: Tools and Help icon.

msn MA-PD M2: Medicare Basics - MSN Explorer

MA-PD M2: Medicare Basics Powered by Brainshark

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Lesson 1: Original Medicare (Medicare Part A and Part B)

Contents Attachments

- 10. Pre-QUIZ 4
- 11. Lesson 1: Original M... 0:34
- 12. Lesson 1: Original M... 0:31
- 13. Lesson 1: Original M... 0:23
- 14. Lesson 1: Original M... 0:32
- 15. Lesson 1: Original M... 0:23
- 16. Lesson 1: Original M... 0:55
- 17. Lesson 1: Original M... 0:24
- 26. Lesson 1: Original M... 0:19
- 27. Lesson 1: Original M... 0:20

Total duration: 17:40 / 30:12

- Part B Coinsurance
 - Coinsurance is the percentage of the Medicare-approved amount that a beneficiary pays after satisfying the Part B deductible.
 - The percentage depends upon the service, and is generally 20% of the Medicare-approved amount for most doctor services, outpatient therapy, preventive services and durable medical equipment.

Slide 27 of 64 0:00 / 0:20

Tools and Help

msn MA-PD M2: Medicare Basics - MSN Explorer

MA-PD M2: Medicare Basics Powered by Brainshark

GORMAN HEALTH GROUP

Lesson 1: Original Medicare (Medicare Part A and Part B)

Contents Attachments

- 10. Pre-QUIZ 4
- 11. Lesson 1: Original M... 0:34
- 12. Lesson 1: Original M... 0:31
- 13. Lesson 1: Original M... 0:23
- 14. Lesson 1: Original M... 0:32
- 15. Lesson 1: Original M... 0:23
- 16. Lesson 1: Original M... 0:55
- 17. Lesson 1: Original M... 0:24
- 26. Lesson 1: Original M... 0:19
- 27. Lesson 1: Original M... 0:20

Total duration: 17:40 / 30:12

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Slide 27 of 64 0:00 / 0:20

Tools

- E-mail a Question
- FAQ
- View Slide Notes
- Viewer Help
- Player Settings

- b. **View Slide Notes:** Click to view voice-over scripting for each slide. Voice-over scripting is written out for each slide for those users without sound.

msn MA-PD M2: Medicare Basics - MSN Explorer

MA-PD M2: Medicare Basics

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Lesson 1: Original Medicare (Medicare Part A and Part B)

- Part B Coinsurance
 - Coinsurance is the percentage of the Medicare-approved amount that a beneficiary pays after satisfying the Part B deductible.
 - The percentage depends upon the service, and is generally 20% of the Medicare-approved amount for most doctor services, outpatient therapy, preventive services and durable medical equipment.

Click "View Slide Notes" to view voice-over scripting for each slide.

Tools

- E-mail a Question
- FAQ
- View Slide Notes
- Viewer Help
- Player Settings

Total duration: 17:40 / 30:12

Slide 27 of 64 0:00 / 0:20

msn MA-PD M2: Medicare Basics - MSN Explorer

MA-PD M2: Medicare Basics

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GORMAN HEALTH GROUP

Lesson 1: Original Medicare (Medicare Part A and Part B)

- Part B Coinsurance
 - Coinsurance is the percentage of the Medicare-approved amount that a beneficiary pays after satisfying the Part B deductible.
 - The percentage depends upon the service, and is generally 20% of the Medicare-approved amount for most doctor services, outpatient therapy, preventive services and durable medical equipment.

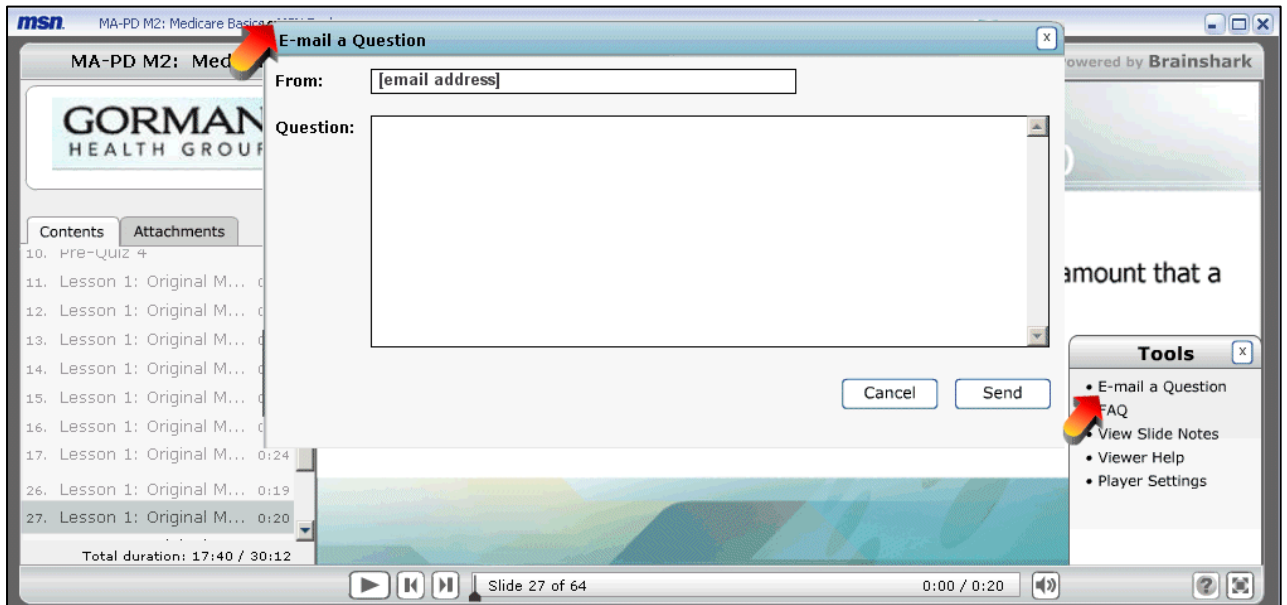
Part B Coinsurance is the percentage of the Medicare-approved amount that a beneficiary pays after satisfying the Part B deductible.

Voice-Over scripting is written out for each slide for those users without sound.

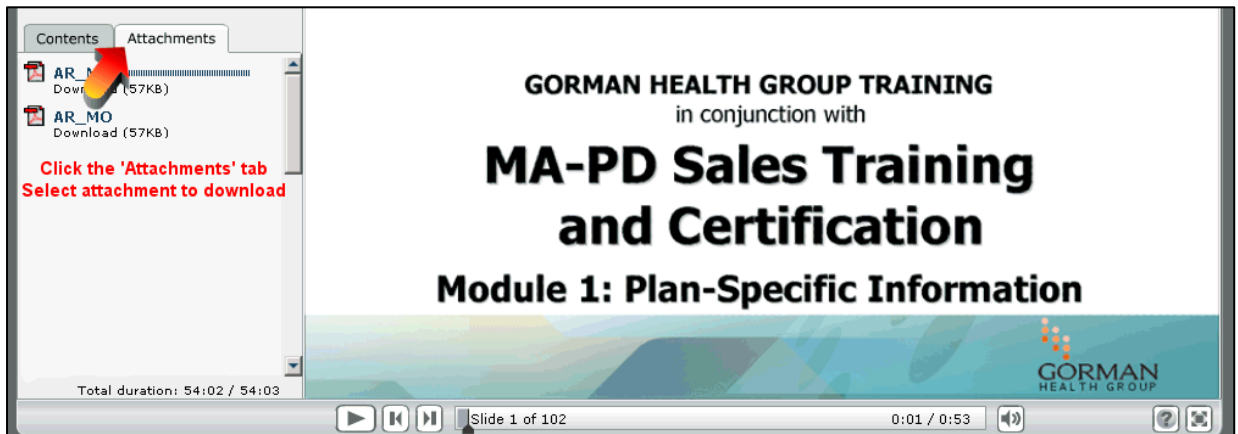
Total duration: 17:40 / 30:12

Slide 27 of 64 0:00 / 0:20

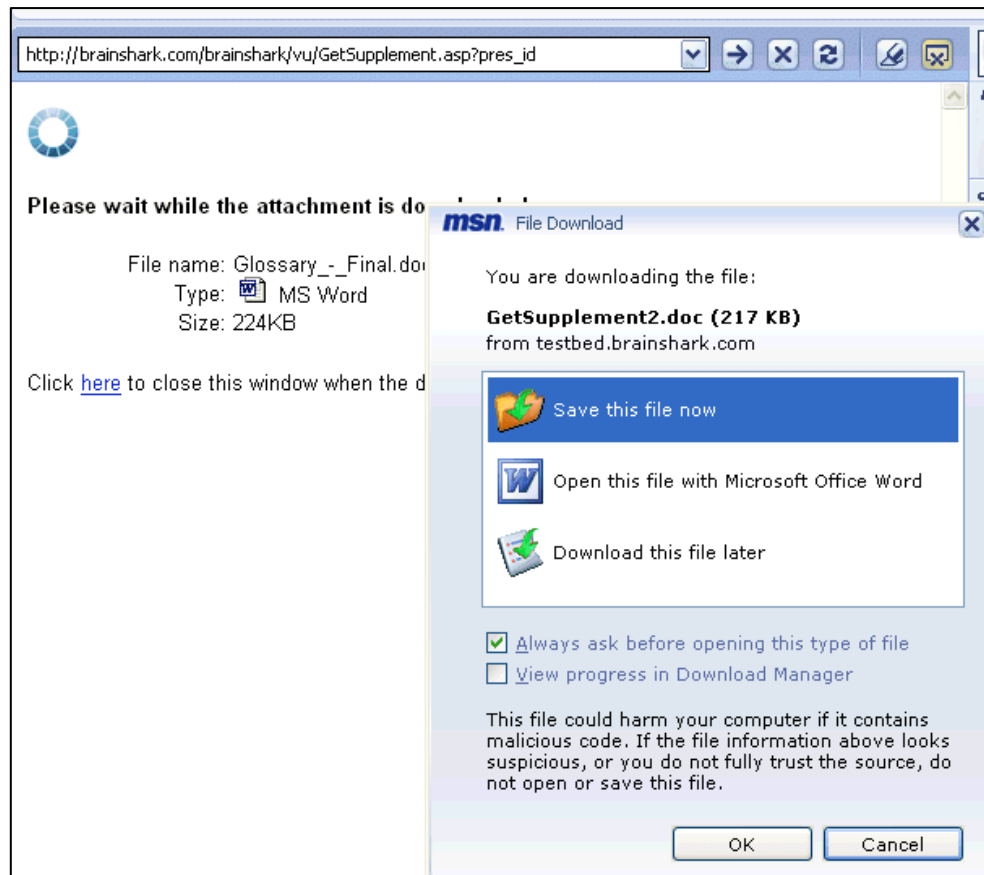
- c. **E-Mail a Question:** From the Tools & Help window, click to send a question regarding the training course.
- a. Questions are generally answered within 1 business day.



- d. **Attachments Tab:** During all of the Module trainings, there are two tabs displayed on the left-hand side of the window. One is titled '**Contents**' and the other is titled '**Attachments**'. The attachments listed can be downloaded to help you during the training. You must access the attachments prior to completing the Modules as they will not be available once you complete the training.

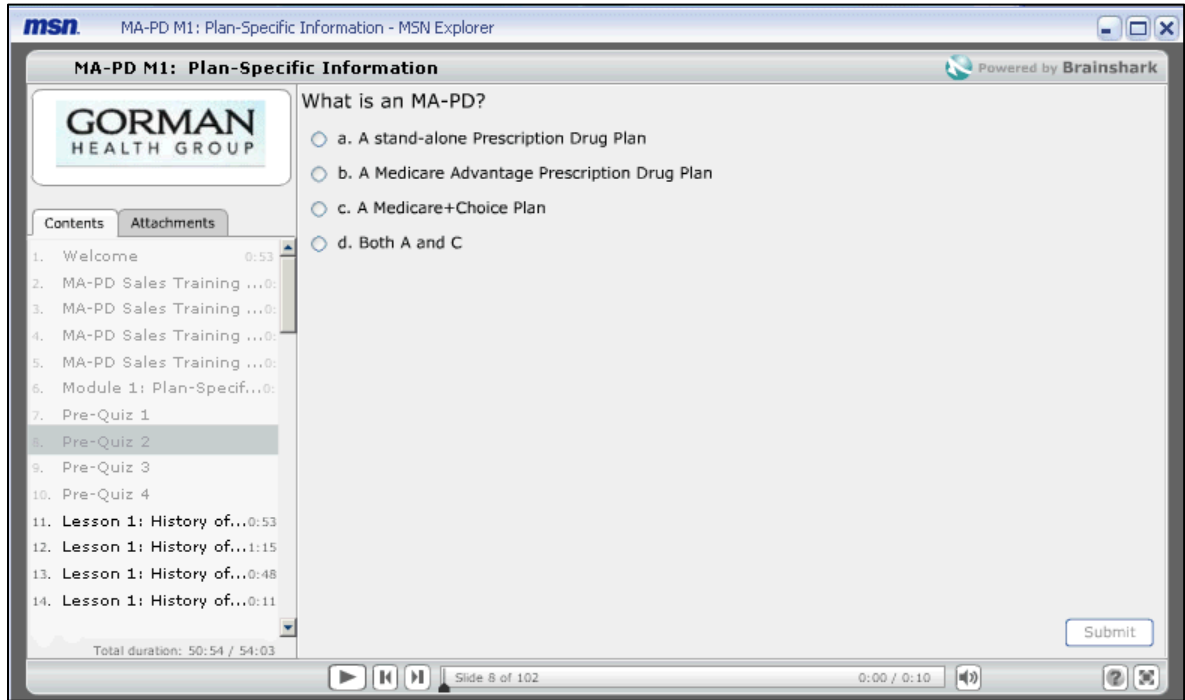


- i. **Click on one of the listed attachments to open the attachment. Your computer might be configured to save the file, open the file, or download the file at a later time as seen below.**

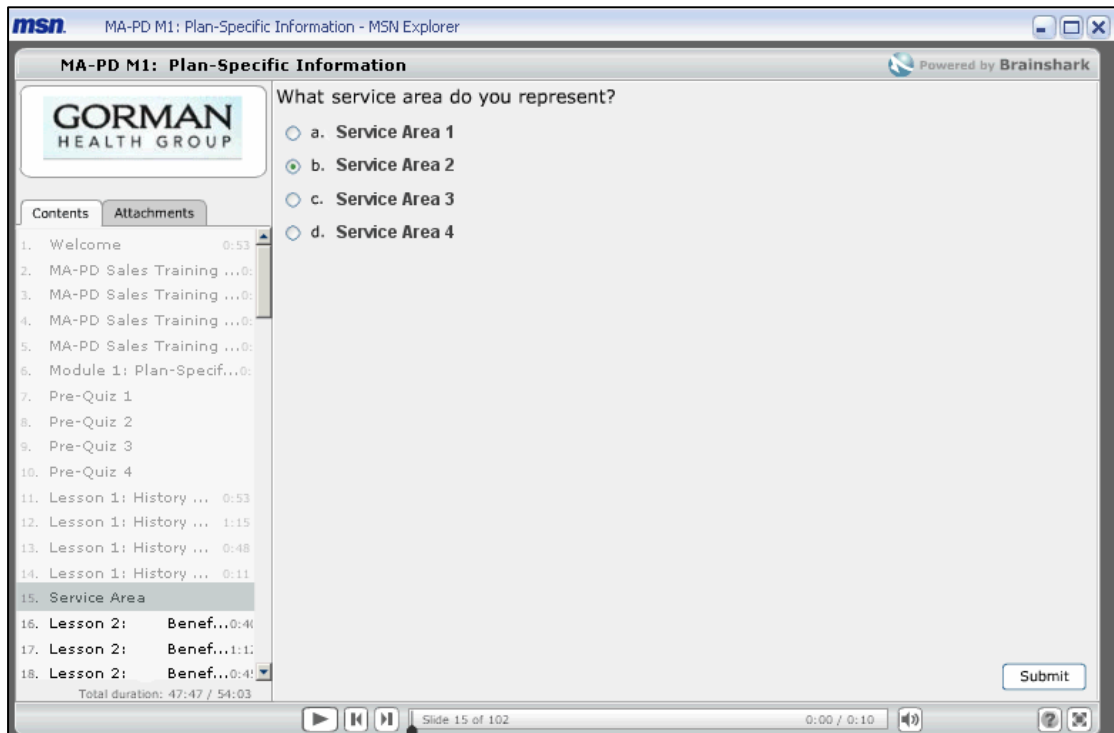


e. Interactive Module Slides.

- i. **Question slides are interactive slides.** Select an answer and then click 'Submit' at the bottom right corner of the screen.



- ii. **Certain Question slides are designed to skip part of the training based on the answer given.** This allows you to review only the slides applicable to the service area you represent.



- f. **Module Completion:** After a course or exam is completed, you must close the viewing window and return to the Curriculum page to continue the training.

msn. MA-PD M1: Plan-Specific Information - MSN Explorer

MA-PD M1: Plan-Specific Information

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Module 1: Plan Specific Information Exam

Click to close browser window

- You have finished the MA-PD Sales Training and Certification Module 1 training course.
- Once you begin the exam, you **MUST** complete the entire exam within a single session.
- Before you can advance to the next module you must receive a passing score of 70% or higher on the module exam.
- Questions are worth different values, so take your time.
- Upon completion of the exam, your score will be provided to you, and your results will be sent to your organization.
- Close this browser window to return to the Curriculum Overview Page.

Contents	Attachments
85. Lesson 3:	0:49
86. Lesson 3:	0:26
87. Lesson 3:	0:34
88. Lesson 3:	0:34
89. Lesson 3:	0:42
90. Lesson 3:	0:18
91. Lesson 3:	0:17
92. Lesson 3:	0:23
93. Lesson 3:	0:48
94. Lesson 4:	0:30
95. Lesson 4:	0:38
96. Lesson 4:	0:30
97. Lesson 4:	0:41
98. Lesson 4:	0:16
99. Lesson 4:	0:40
100. Lesson 4:	0:18
101. Lesson 4:	0:39
102. MA-PD M1 Com...	0:37

Total duration: 0:37 / 54:03

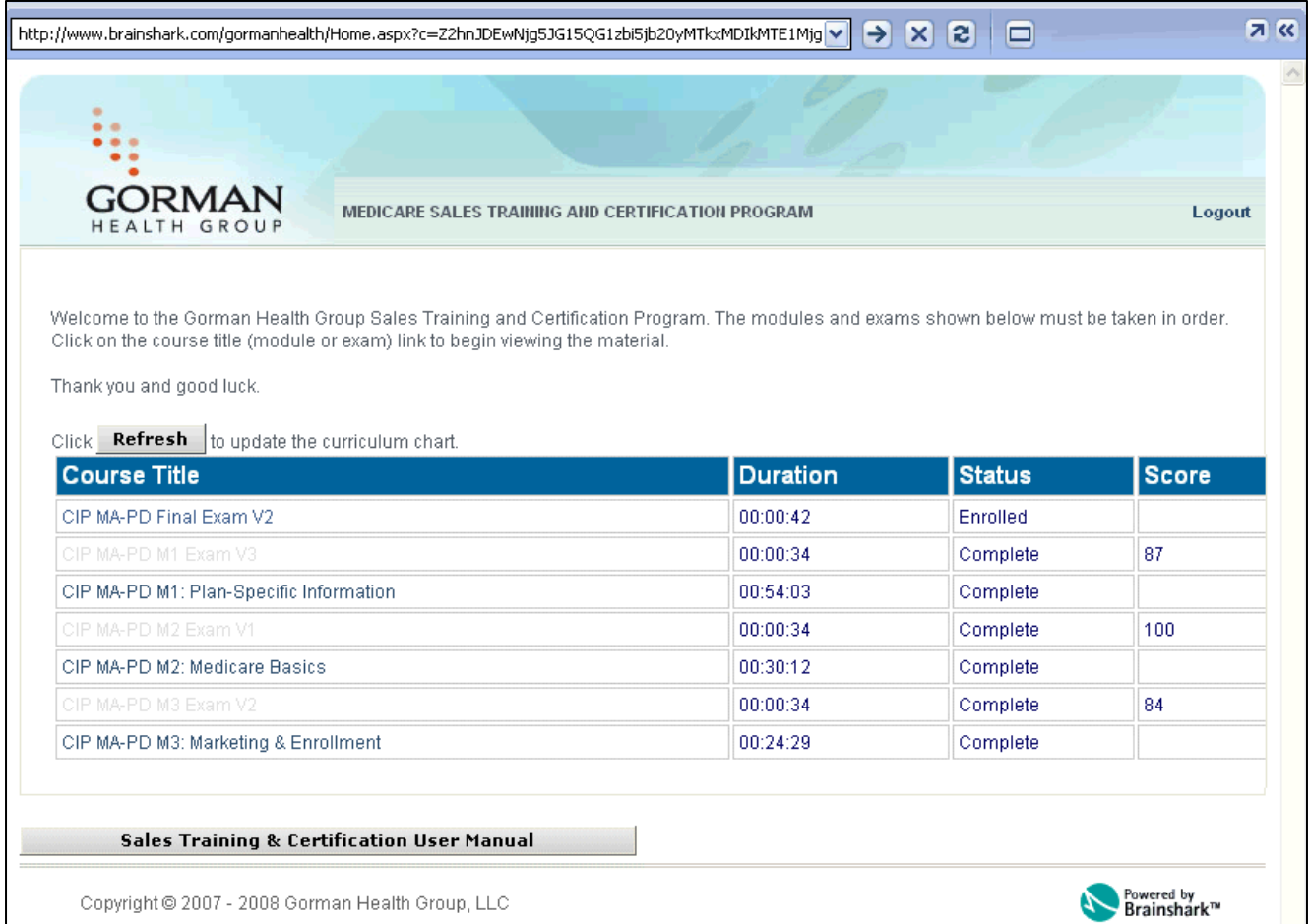
Slide 102 of 102

0:00 / 0:37

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VII. Modules and Module Exams are Complete

- a. When all modules and their corresponding exams are completed, the 3 module courses will reopen for review prior to you having to complete the final exam.



http://www.brainshark.com/gormanhealth/Home.aspx?c=Z2hnJDEwNjg5JG15QG1zbi5jb20yMTkxMDIiKTE1Mjg

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MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM

Logout

Welcome to the Gorman Health Group Sales Training and Certification Program. The modules and exams shown below must be taken in order. Click on the course title (module or exam) link to begin viewing the material.

Thank you and good luck.

Click **Refresh** to update the curriculum chart.

Course Title	Duration	Status	Score
CIP MA-PD Final Exam V2	00:00:42	Enrolled	
CIP MA-PD M1 Exam V3	00:00:34	Complete	87
CIP MA-PD M1: Plan-Specific Information	00:54:03	Complete	
CIP MA-PD M2 Exam V1	00:00:34	Complete	100
CIP MA-PD M2: Medicare Basics	00:30:12	Complete	
CIP MA-PD M3 Exam V2	00:00:34	Complete	84
CIP MA-PD M3: Marketing & Enrollment	00:24:29	Complete	

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- b. To receive Certification you must complete all three training modules, and pass the module exams and final exam.
 - i. Once you have viewed all the slides in the module, the module will be closed to further review until just prior to beginning the final exam.
 - ii. You must complete and pass the exam within a single session.
 - iii. You cannot proceed to the next module until you have successfully passed the previous module exam.
- c. If you fail an exam you must retake the exam until you receive a passing score before advancing to the next module.

- d. After clicking on the Final Exam link, you are returned to the Module Window to complete the test. Your score can be seen at the bottom left corner of the Module Window during the final exam.

The screenshot shows a web browser window titled "MA-PD Final Exam V2 - MSN Explorer". The page header includes the "GORMAN HEALTH GROUP" logo and the text "MA-PD Sales Training and Certification Final Exam". A "Powered by Brainshark" logo is in the top right corner. On the left, a navigation menu lists 19 items, with "1. CIP MA-PD Final Exam 0:42" selected. The main content area contains a list of bullet points:

- Welcome to the MA-PD Sales Training and Certification Final Exam. Once you advance past this slide to the first exam question, you **MUST** complete the entire exam within a single session.
- If you score less than 70%, you will be required to re-take the final exam.
- Your score will be provided upon completion of the final exam and your results will be sent to your organization. Upon passing, you will also be able to print a Certification of Completion.
- Please take the time to complete the evaluation survey for this training as your feedback is invaluable to enhancing this training.
- Thank you and Good luck.

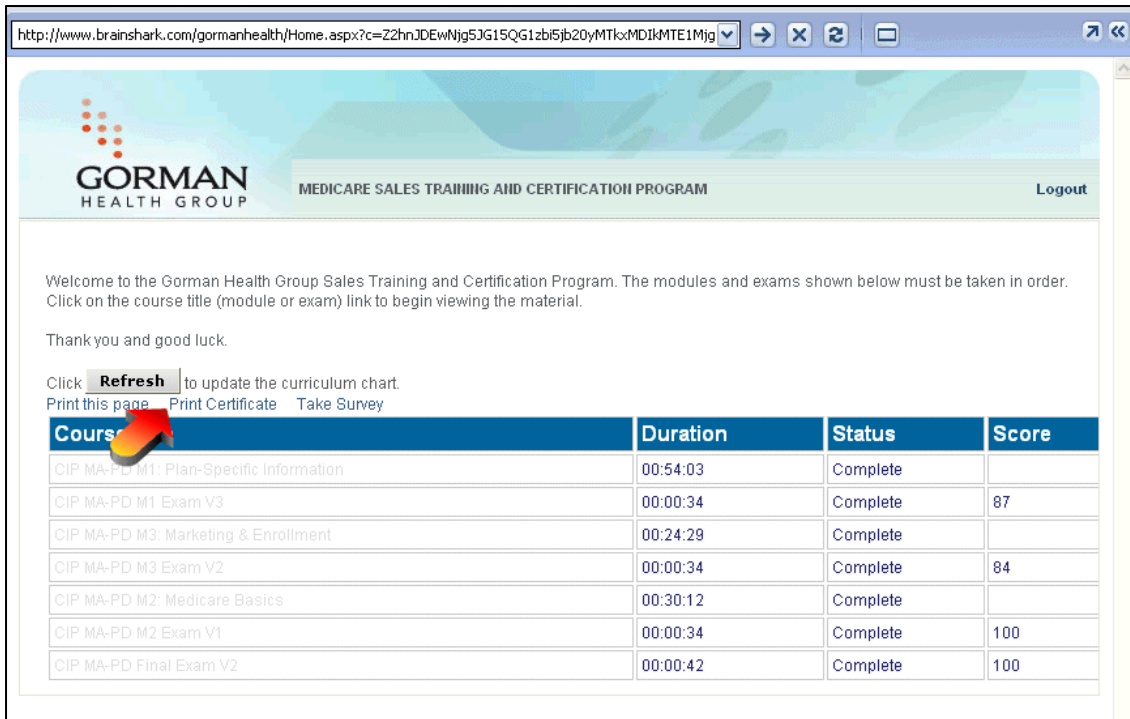
To the right of the text is an image of a wooden stamp with "A+" on it, resting on a piece of lined paper with a red "A+" written on it. At the bottom of the slide, there is a GORMAN HEALTH GROUP logo. The browser's status bar at the bottom shows "Slide 1 of 26", "0:01 / 0:42", and a speaker icon.

VIII. New Links

New links become available on the Curriculum Page when Final exam is completed with a passing score.

a. Print Certificate.

Click on this link to print and/or save the certificate as a PDF.



http://www.brainshark.com/gormanhealth/Home.aspx?c=Z2hnJDEwNjg5JG15QG1zbi5jb20yMTkxMDIhMTE1Mjg

GORMAN HEALTH GROUP MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM [Logout](#)

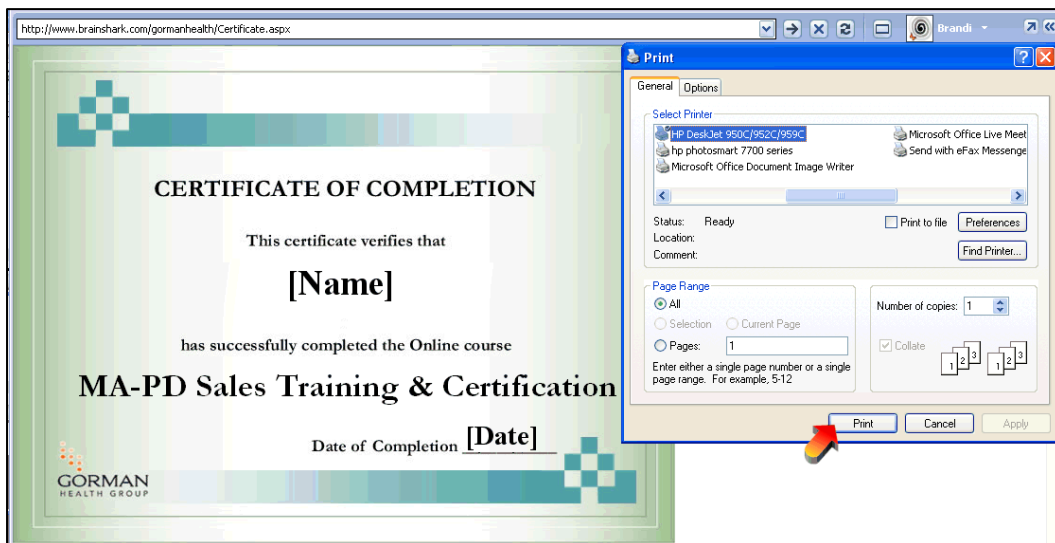
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Thank you and good luck.

Click [Refresh](#) to update the curriculum chart.
[Print this page](#) [Print Certificate](#) [Take Survey](#)

Course	Duration	Status	Score
CIP MA-PD M1: Plan-Specific Information	00:54:03	Complete	
CIP MA-PD M1 Exam V3	00:00:34	Complete	87
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CIP MA-PD M3 Exam V2	00:00:34	Complete	84
CIP MA-PD M2: Medicare Basics	00:30:12	Complete	
CIP MA-PD M2 Exam V1	00:00:34	Complete	100
CIP MA-PD Final Exam V2	00:00:42	Complete	100

b. Please keep this document for your records.



http://www.brainshark.com/gormanhealth/Certificate.aspx

CERTIFICATE OF COMPLETION

This certificate verifies that
[Name]
has successfully completed the Online course
MA-PD Sales Training & Certification
Date of Completion **[Date]**

GORMAN HEALTH GROUP

Print **Cancel** **Apply**

c. Take Survey.

Click on this link to provide your feedback regarding the training.

http://www.brainshark.com/gormanhealth/Home.aspx?c=Z2hnJDEwNjg5JG15QG1zbi5jb20yMTcxMDIKMTE1Mjg

GORMAN HEALTH GROUP MEDICARE SALES TRAINING AND CERTIFICATION PROGRAM [Logout](#)

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[Print this page](#) [Print Certificate](#) [Take Survey](#)

Course Title	Duration	Status	Score
CIP MA-PD M1: Plan-Specific Information	00:54:03	Complete	
CIP MA-PD M1 Exam V3	00:00:34	Complete	87
CIP MA-PD M3: Marketing & Enrollment	00:24:29	Complete	
CIP MA-PD M3 Exam V2	00:00:34	Complete	84
CIP MA-PD M2: Medicare Basics	00:30:12	Complete	
CIP MA-PD M2 Exam V1	00:00:34	Complete	100
CIP MA-PD Final Exam V2	00:00:42	Complete	100

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