Broker Quick Start Guide:
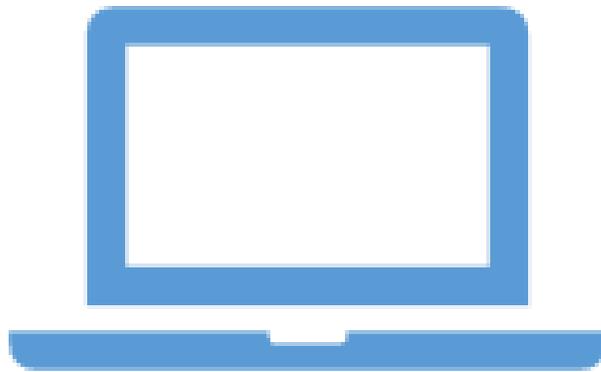
2022 Certification Training Instructions

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2022 Certification Training Instructions
Access Training and Support Contacts

How to access the training:

- Click on the link included in the emailed invitation, which is sent from no-reply-regence@pinpointglobal.com
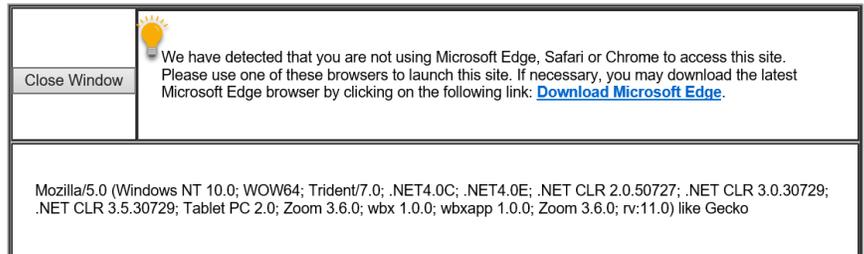
CLICK HERE to register and access the
2022 Annual Medicare Training & Certification

Supported browsers

- Chrome

- Microsoft Edge

- Safari

- Agents who use Internet Explorer will receive a warning that a supported browser must be used to proceed.

Close Window

We have detected that you are not using Microsoft Edge, Safari or Chrome to access this site. Please use one of these browsers to launch this site. If necessary, you may download the latest Microsoft Edge browser by clicking on the following link: **Download Microsoft Edge**.

Mozilla/5.0 (Windows NT 10.0; WOW64; Trident/7.0; .NET4.0C; .NET4.0E; .NET CLR 2.0.50727; .NET CLR 3.0.30729; .NET CLR 3.5.30729; Tablet PC 2.0; Zoom 3.6.0; wbx 1.0.0; wbxapp 1.0.0; Zoom 3.6.0; rv:11.0) like Gecko

Technical help

Contact the Medicare sales team:

- (800) 557-0555

- RegenceMedicareSales@regence.com

- Your Medicare Sales Executive

- Select **Request Support** (located in the top right corner within the Medicare Certification system).

Certification Deadlines

Certification training must be completed by the deadline to be ready to sell for AEP and receive commissions for 2022.

- Existing Agents: **September 15, 2021**

- New Agents: **within 30-days of the initial notice to certify**

  NOTE: New agents who complete the 2022 certification training will also be ready to sell for the remainder of 2021. **No additional certification training is required.**

2022 Certification Training Instructions

Welcome Screen and New User Registration:

Welcome Screen

1. Registration for new users

2. Login for returning users

💡 Access the training instruction sheet from the Welcome screen.

Registration for new users

1. Select **Click here to register** from the Welcome screen

2. Enter registration credentials, then select **Continue**

   - Registration ID (**National Producer Number** - **NPN**)

   - Access Code (**Regence2022**)

💡 Contact technical support for help if the 'preregistration information was not found' error occurs.

3. Select **Lookup NPN using NIPR**

4. Enter SSN and Last Name and select **Submit Query.**

5. Name and NPN will appear as a result. Select **Use this NPN.**

💡 If no results found, search by License (enter license number, select a state from the drop down menu then select submit query.)

2022 Certification Training Instructions

New User Registration (continued) and Returning User Login

New Users Registration (continued)

6. **NPN** auto-populates, select **Submit.**

7. Complete the following sections on the profile page, then select **Register**:

   - Email

   - Address

   - Create and confirm password (case sensitive)

   - Select a security question from the drop-down and provide answer

   The Training Provider field cannot be changed. Refer to instructions on how to upload the AHIP/NAHU certificate.

8. Select **Continue** on the new user confirmation page to proceed.

Returning User Login

Enter username (NPN - National Producer Number) and password used previously (case sensitive), then select **Login.**

Forgot Password?

   - Select **Forgot Password?**

   - Enter Username (NPN) and follow the prompts to create a new password.

   Users can chose to answer the security question created during registration or reset password (temporary password will be sent to the email on file.)

2022 Certification Training Instructions

Home Screen and Certifications

Basic Navigation

1. **Certifications** - Certification training

2. **Transcript** - Certificate of Completion

3. **Resources** - Additional materials:

   - Certification training course slides

   - Certification Quick Start Guide (instructions)

   - First look of 2022 plan benefits

   - Medicare agent landing pages with access to additional resources

   - CMS Chapter 2 & Chapter 3, and MA communication requirements.

4. **My profile** - update security question, contact info and change password.

5. **Request Support** - submit a form or find phone number to call for support.
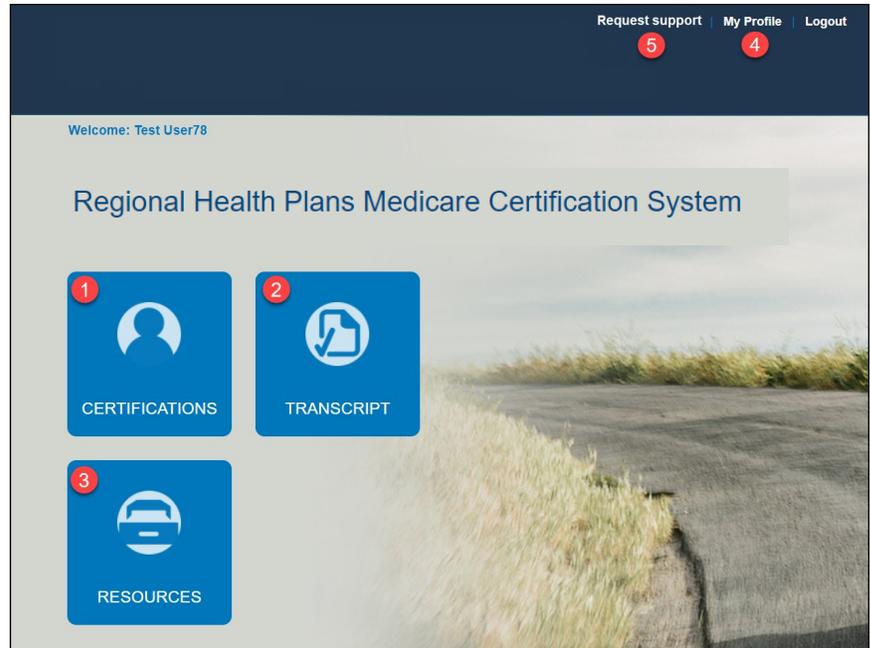
Certifications

The Certification Track includes all courses required to certify for 2022.

To start, click on the course title (highlighted yellow on the screenshot).

Once completed in full, the course will be checked off with a blue checkmark, the status updates to 'Complete' and the completion date appears.

Courses must be completed in order. Agents cannot proceed until the previous course(s) show complete.

2022 Certification Training Instructions

Certification - Attestations

Attestations

The **2022 Agent Certification** and **Medicare Compliance Addendum** include important information. Agents must follow the steps below to sign and acknowledge the information has been reviewed:

1. Read the information included in both pages of each document.

2. Select **Click to sign**
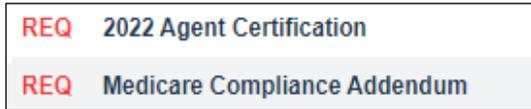
💡 The signature section is located under the document at the bottom of the webpage. Either scroll down or type CTRL + - (minus) to zoom out.

4. Type your name on the signature pop-up (name may pre-populate, update as needed)

5. Select **Use text signature**

6. Select **Ok** on the pop-up warning that asks if you are sure you want to use the text signature.

7. Check the box next to **Click here to submit**.

8. Once the agent name and signature date appear, close the Attestation tab to return to the Training Tracker.

💡 If the course doesn't immediately show "complete" on the training tracker, make sure the Attestation tab is closed and click the browser refresh button.

REQ	2022 Agent Certification
REQ	Medicare Compliance Addendum

Signed By: **Click to Sign** ②

Signature

Type your name below to sign

③ John Smith

④ Use Text Signature

medicare2.uat4.pinpointglobal.com says
Are you sure you want to use the Text Signature?
⑤ **OK** Cancel

Signed By: John Smith   Date: 6/16/2021
⑥ ☑ Click here to submit

Attestation ⑦ ✕ +
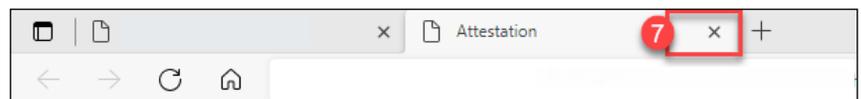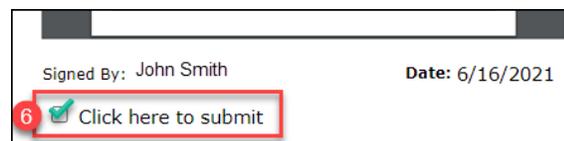
2022 Certification Training Instructions

Certification - Medicare Training

Medicare Core, Compliance & FWA

The Medicare Training courses include Medicare Core, Compliance and Fraud, Waste & Abuse. Follow the steps below to complete training in Pinpoint, or Skip to the Certificate Upload step if training was completed through AHIP/NAHU.

> We will accept the Medicare Core training offered through Pinpoint, AHIP and NAHU for 2022. **Important:** The certificate must include Fraud, Waste & Abuse to be valid.
>
> **TIP: If applicable, complete the core training through AHIP or NAHU before starting the certification training.**

Pinpoint Medicare Training

1. Select **Medicare Training**. Users will be redirected to the Pinpoint Global Medicare Certification System.

2. On the Registration page, verify or complete all required fields, enter payment information, then select **Register**.

- Agents should only check the box next to Silverscripts Members Only if appointed/certified for SilverScripts.

The Pinpoint Medicare Training includes 3 parts and 1 final exam. The exam is closed book and agents must pass with 85% or higher - unlimited attempts.

- Review Additional instructions located throughout the Pinpoint Medicare Certification System for additional guidance.

Once the Medicare training is complete, close the tab to return to the Certification Track. The course will show complete and agents will be able to proceed to the product training.

REQ **Medicare Training** 1
If you have completed your Medicare Training through AHIP, click here.

☑ SILVERSCRIPTS MEMBERS ONLY: Please send SilverScript my National Training completion transcript. I understand that the credit will be automatically applied within 2 business days. I also understand that I still have to take the SilverScript Product & Process course through the SilverScript Agent Portal.

MEDICARE 2022

REQ 2022 PART 1 - ORIGINAL MEDICARE BASICS

REQ 2022 PART 2 - MEDICARE COMPLIANCE & SALES OVERSIGHT

REQ 2022 PART 3 - COMBATING MEDICARE PARTS C AND D FRAUD, WASTE, AND ABUSE + MEDICARE PARTS C AND D GENERAL COMPLIANCE TRAINING

If you have completed your FWA Training through CMS, please click here to upload your certificate.

REQ MEDICARE FINAL EXAM

2022 Certification Training Instructions

Certification - Medicare Training CE Credits

CE Credits

Agents who complete the Medicare Core training in Pinpoint can purchase CE credits for an additional $28 **before** or **after** completing the final exam.

💡 We do not offer CE credits on the product training.

To purchase CE credits:

1. Select **Purchase Final with CE credits**

2. Check the box for requested **state(s)** then select **Proceed to CE process and final exam**

3. Enter **License number** and **expiration date,** then select **Update License ID(s).**

4. Complete any additional attestations (varies based on state requirements) by selecting each item in sequential order and following instructions.

5. Select **Medicare Final Exam**

💡 Agents who purchase CE credits *AFTER* completing the final exam (must be within 90-days) will not be required to complete the exam again.

6. When all required steps are complete, select **Ready to submit CE.**

7. Select **Purchase,** then enter credit card information and select **purchase** again to finalize the transaction.

💡 Pop-up blockers must be disabled to view the payment screen.

This Pinpoint training program qualifies for CE credits in most states (additional fees apply). If you wish to apply for CE credits, please click the "Purchase Final with CE Credits" button below and follow the instructions.

TAKE FINAL WITHOUT CE CREDITS   1 PURCHASE FINAL WITH CE CREDITS

CE credits are available in the following states.

States that have a "*" require a monitoring affidavit.

SELECT STATE(S)

- Alaska *
- Arizona
- Arkansas *
- Delaware
- District of Columbia
- Georgia *
- Idaho
- Illinois
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri *
- Montana
- Nebraska
- New Mexico *
- North Carolina *
- North Dakota
- Ohio
- Oregon
- Rhode Island *
- South Carolina
- South Dakota
- Tennessee
- Utah
- Vermont
- Virginia
- West Virginia
- Wisconsin *
- Wyoming

2 PROCEED TO CE PROCESS AND FINAL EXAM

STOP **Availability may change or be delayed based on state approval**

Step 1: Begin by entering your license number for the state(s) selected below.

State	Hours	Cost	Notes	Purchase Date	License Number	Expiration Date
Oregon	8	$28.00			12345	05/31/2022

3 UPDATE LICENSE ID(S)

☑	REQ	4 ATTESTATION
☑	REQ	GRADING REGISTRATION FORM
☑	REQ	MONITOR GUIDE
☑	REQ	MEDICARE FINAL EXAM 5

6 READY TO SUBMIT CE

State	Hours	Cost
South Dakota CE Purchase	8	$28.00

PURCHASE

Pinpoint **Medicare Certification System**

Total
$ 28.00

Pay with card   VISA MasterCard AMEX JCB DISCOVER

Card Number
**** **** **** ****

Expiration Date (MM/YY)   CVV (3 digits)
MM/YY   •••

All CE purchases from this site will be listed under National Underwriters on your credit card statement. Once you click 'Purchase' you will be charged for the credits. Note: Please only click 'Purchase' once. Clicking more than once may result in multiple charges to your account.

Purchase

2022 Certification Training Instructions
Certification - AHIP/NAHU Certificate Upload

AHIP/NAHU Certificate Upload

Follow these steps to upload your AHIP or NAHU certificate:

1. On the 3rd course (Medicare Training), select **here** within the subtext under the course title.

2. Select the course title, which has changed to **Import Medicare Certificate of Completion.**

STOP **DO NOT** select Pinpoint when the subtext changes to "Switch to Pinpoint as your Medicare provider."

3. Enter the following data:

    • Date training completed (must match date shown on certificate)

    • Certification training provider

4. Select **choose file** to open computer folders and locate the certificate.

    a. Select folder the file is saved in

    b. Click on the file name to select it

    c. Select **Open**

5. Check the **attestation box**

6. Select **Submit**. You will receive a pop-up notification that the certificate was updated successfully - click **Ok.**

The certificate will show **Pending** until reviewed and approved. Proceed to the next course, 2022 Plan Training. An email notification will be sent if the certificate is denied.

IMPORTANT: The certificate must be saved on the computer to upload it into the Certification Track. There is no option to transmit the certificate from AHIP.

2022 Certification Training Instructions

Certification – Product Courses & Final Exam

Product Courses

Here are a few tips to complete the Product courses:

1. After selecting the course from the Certificate Track, it will launch on a new tab. To start, click the right arrow at the bottom of the screen to advance to the next slide.

2. At the end of the course, select **Click Here to Complete this Program**. This will close the tab and bring users back to the Certification Track.
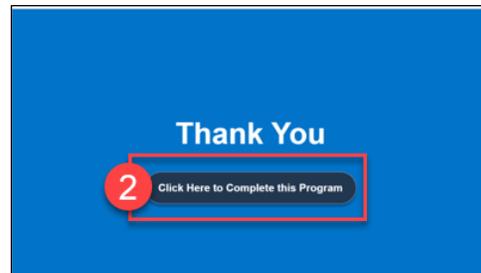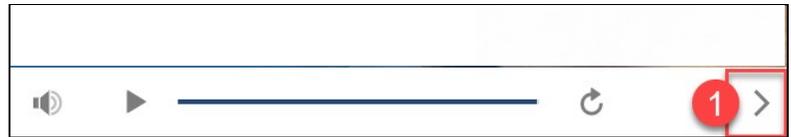
💡 If the course does not automatically update to "complete", try refreshing the webpage.

Plan Specific Final Exam

Agents have 3 attempts to pass with 85% or higher.

To start, select the **final exam** then select **Continue** in the important notification**.** After answering all 20 questions, select **submit.** This counts as an attempt.

After achieving a passing score, agents can review their Q&A:

1. Select **View Answer Feedback**.

2. When finished, select **View Results Summary.**

3. Select **Exit Exam** to complete exam.

💡 **Important**: Agents will not receive email confirmation that all required training is complete.
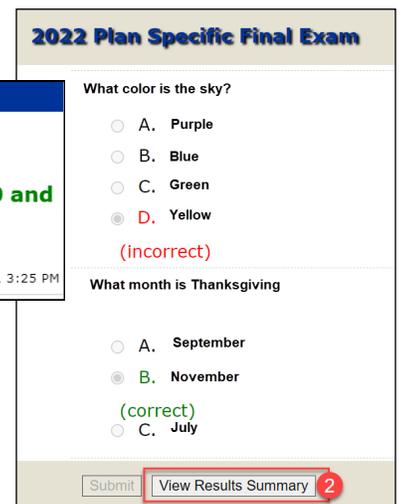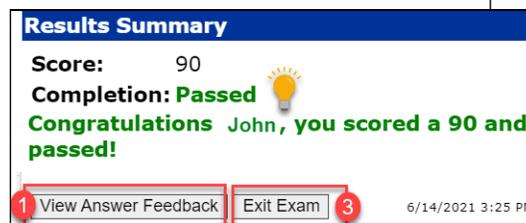
# 2022 Certification Training Instructions
Resources & Transcript

Resources

Access print slides from the training courses, 2022 plan benefit grids, and CMS publications.

To start:

1. Select **Resources** from the home page, or the menu located in the top left corner.

2. Select a category to view available resources.

3. Select the applicable document/link

💡 The resources open in a new tab to download, save, print, or bookmark to access anytime.
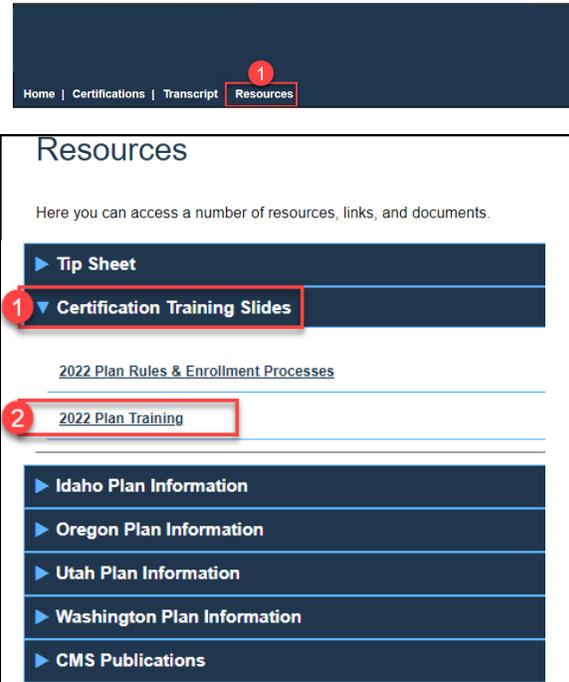
Transcript

Access to the Certificate of Completion for agents to view, save or print. (**Do not send to us**). This serves as confirmation that all required training is complete.

1. To start, select **Transcript** from the home page, or the menu located in top left corner.

2. Select **Print Certificate** located under the Certification Track.

💡 If the Print Certificate option is not showing, verify:
   1. You are on My Transcript
   2. All courses are complete, including AHIP/NAHU Certificate Upload.