

## CAC FAQs – September 16, 2014

### 1. How do I access my CAC recertification training?

The training for CACs is located at <http://marketplace.medicarelearningnetworklms.com/>. Your login ID must be the 13 character alphanumeric Assister ID number created by CMS and assigned by your organization. If you are not sure what your Assister ID number is, contact your organization for additional information. Follow the steps below to access the 2015 CAC training:

- Go to the My Upcoming Learning page, and then click the hyperlinked title “[Certified Application Counselor Curriculum Benefit Year 2015.](#)”
- Click the **Enroll** button
- Click the **Access Item** button
- Once you have enrolled in your curriculum, you will be able to enroll in the first course. Note that courses must be completed in order and you will not be able to enroll in a course until you have completed the courses and assessment that come before it.
- Click the hyperlinked title of the first available course ([Training Overview](#)), then click **Enroll**
- Click **Enroll** once more in the new window that opens. You may keep the default settings that are in place for Course Credit Options and Course Mode Options
- To begin the first course, click the **Open Item** button to proceed

### 2. If a CAC certification has not expired, is it mandatory to take the 2015 CAC training?

If a CACs certification has not expired, it is **not** mandatory for them to take the 2015 CAC training; however, CMS encourages organizations to have each of their CACs take the 2015 training even in cases where the CAC’s annual recertification may not be due for several months. This will ensure that CACs have received the most up-to-date training to be prepared to assist existing enrollees through the Marketplace redetermination and renewal process and to provide application and enrollment assistance for new consumers during the Open Enrollment Period for the 2015 plan year in the individual market, which begins November 15, 2014.

### 3. What does a CAC need to do to recertify?

CACs in the FFM including the SPM whose certification expiration date will soon expire, they must do the following to recertify:

- Successfully complete the 2015 CAC training. Provide your CAC designated organization (CDO) with your training certificate of completion
- Complete the Recertification Request form. CMS has created a model recertification request form, which can be found here: <http://marketplace.cms.gov/technical-assistance-resources/assister-programs/guidance-regulations-on-assister-programs.html>.
  - Your CDO can use this form or modify it to meet their needs.
- If necessary, enter into a new agreement with your CDO.
- Meet all other requirements as set forth by your CDO.

CMS encourages CACs to take the 2015 training even in cases where their annual recertification may not be due for several months. Your CDO will issue a new certification, which is good for one year, and should be displayed when assisting consumers.

#### **4. What does the designated organization need to do to recertify their staff and volunteers?**

As a designated organization, you would have to do the following:

- Have a process in place for identifying staff and volunteers
  - compliance with federal rules,
  - the terms of their agreement
  - the organization's policies and procedures, and
  - adherence to any particular state requirements
- Ask each fully compliant CAC whether s/he would like to be recertified and provide these individuals a recertification request form. This form should collect information regarding any conflicts of interest the individual has and when the individual completed the 2015 training.
- Ensure each fully compliant staff or volunteer successfully complete the 2015 CAC training.
- Collect and maintain the recertification request forms.
- Enter into a new agreement with the individual, if necessary
- Issue a new official CAC certificate which must always be prominently displayed when assisting consumers.

Other than recertifying individual CACs in a manner consistent with the guidance set forth in the recertification bulletin, a designated organization should continue to monitor and track the performance of its CACs, oversee its CACs to ensure that they are in compliance with the federal regulations (including the regulations that were recently finalized), as well as the provisions in its agreement with CMS. If you have any further questions about the regulations or your agreement with CMS, you can contact us at [CACquestions@cms.hhs.gov](mailto:CACquestions@cms.hhs.gov).

#### **5. If an individual CAC completed training on the Medicare Learning Network (MLN) in July or August 2013, and it has been a year or more since the CAC was issued a training completion certificate. Does this mean that the CAC certification has already expired?**

The official CAC certification is issued only by the CAC designated organization with which the CAC is affiliated. Furthermore, a CAC designated organization is authorized to certify its staff or volunteers as CACs only after that organization has completed all steps required in the designation process and received a confirmation of designation email from CMS, which CMS sends only after the organization has signed its agreement with CMS and submitted the signed agreement to CMS. Last year, CMS sent no official confirmation of designation emails to organizations before mid-September 2013, which means that mid-September 2013 is the earliest that any individual CAC could have been validly certified by his or her designated organization. Therefore, no individual CAC's recertification anniversary date should be earlier than mid-September 2014.

#### **6. Will the 2015 training for CACs in the Federally-facilitated Marketplace be the same as the 2014 training?**

For the 2015 training, CMS is updating the CAC training curriculum to include Federally-facilitated Marketplace enhancements for the Open Enrollment Period for the 2015 plan year

in the individual market, as it is doing for Navigator training. The curriculum structure and certification process will remain essentially the same. For 2014-2015, in addition to completing the required training curriculum to become initially certified or to become recertified, CACs will also have access to the full suite of training modules that are required for the certification of Navigators and non-Navigator assistance personnel operating in the Federally-facilitated Marketplaces. The additional courses will be optional for CACs and provide a more in-depth overview of the Federally-facilitated Marketplaces and the duties required of different assister types.

**7. As an existing CAC or CAC designated organization in a Federally-facilitated Marketplace, do I need to complete and return a new agreement?**

CAC designated organizations in a Federally-facilitated Marketplace do not need to enter into and return a new agreement to CMS, since that agreement, by its terms, renews automatically after each one-year term (unless either CMS or the organization terminates it or CMS notifies the organization that the agreement will not be renewed). CMS regulations do not require CAC designated organizations to enter into a new agreement with their individual CACs as part of the recertification process, but organizations may choose to do so in accordance with their internal policies and procedures for overseeing the individual CACs they certify. Additionally, if CAC designated organizations in a Federally-facilitated Marketplace choose to keep in place the same agreement they used to initially certify their staff and volunteers as CACs, they should ensure that the agreement's term has not expired. If it has expired, the individual is no longer authorized to serve as a CAC, and the organization must enter into a new agreement in order for the individual to serve as a CAC again, pursuant to 45 CFR 155.225(d)(6). As a reminder, the model agreement that CMS provided in each organization's welcome packet states that, with certain exceptions, it will renew automatically after each one year term, 3 which would in many cases allow the organization to take no action in order to keep in place the same agreement.

For additional information on Plan Year 2015 recertification for Navigators and CACs, review the August 15, 2014 **CMS Enrollment Assister Bulletin: 2014-01** at <http://marketplace.cms.gov/technical-assistance-resources/assister-programs/guidance-regulations-on-assister-programs.html>