Purpose

• The purpose of this webinar is to help agents prepare for the 2014 HCSC/HISC Producer Training & Certification Program by reviewing milestone dates, changes and requirements.

• This webinar is NOT a replacement for the 2014 HCSC/HISC Producer Training & Certification requirements.
Agenda

• Milestone Dates
• Accessing Training
• Courses, Exams and Forms
• 2014 Changes
• To Do List
• Communications
• Continuing Education Credits
Milestone Dates
Milestone Dates

• Launch
• 2014 Business Renewal Deadline
• 2013 Certification Closes
• 2014 Certification Closes
• 2014 Certification Reopens
Milestone Dates

• Launch
  • Targeted for early September
  • Blue Notes Alert
  • News for the Blues Newsletter
  • Producer launch email
In accordance with the guidelines established by the Centers for Medicare and Medicaid Services (CMS), **all agents must be trained and certified annually** in order to market, sell and/or service PDP and MAPD products.
CMS guidance states that an agent must be certified in order to receive renewal compensation for policies sold after the 2008 plan year.

**Failure to complete** 2014 HCSC/HISC Producer Training & Certification requirements by deadline will result in:

- Blue Cross MedicareRx and Blue Cross Medicare Advantage (where applicable) Book of Business for CYs 2009 and forward being moved to an HISC House Account.
- Blue Cross MedicareRx and Blue Cross Medicare Advantage (where applicable) Book of Business is NOT returned if certification occurs after December 6, 2013 deadline or in a subsequent year.
More Milestone Dates

- 2013 Certification Closes
  - **August 31, 2013** (all 2013 courses removed from to-do list)

- 2014 Certification Closes
  - **December 6, 2013** at 11:59 pm
  - Access is disabled

- 2014 Certification Reopens
  - **January 6, 2014**
  - Applicable for February 2014 effective dates and beyond
  - Do not regain lost Blue Cross MedicareRx/ Blue Cross Medicare Advantage Book of Business
Accessing Training
Operating System Compatibility

- Windows2000
- WinXP or newer
- Mozilla Firefox v1.5 (no newer versions are supported)
- Internet Explorer: versions 6, 7 & 8 (versions 9 and 10 are not supported)
- Adobe Shockwave: versions 7 – 11
- Adobe Flash: versions 7 – 11.x.lf
- Chrome is NOT supported

Call the HCSC Help Desk at 1-888-706-0583 if you do not have any of the software or have problems accessing the training.
Login

1. Go to Blue Access for Producers (BAP); click Certify to Sell 2014 Products link

OR

2. Access certification link via Certification Launch email
User ID

• If you have never accessed training as an **individual**:  
  • Use 9-digit HCSC assigned Producer ID#  
  • Same # to log into BAP  
• If accessing training as an **agency**:  
  • Use 9-digit HCSC assigned Agency ID #

**Note:** Do not use your Social Security # or Tax ID# as login. If unsure of your HCSC assigned Producer or Agency ID #, call the Producer Service Center at **1-855-782-4272** for help.
**Password**

- If you have never accessed Knowledgewire, your initial password is your 9-digit HCSC Producer number
  - You will be then prompted to create a new password
- If you have previously accessed Knowledgewire, use established password
- Keep password in an easily accessible location
- If you need help with resetting a forgotten password, please contact the HCSC Helpdesk at **1-888-706-0583**
Courses, Exams & Forms
Objectives

Set expectations

- Deadlines
  - Certification launch and closure
- Requirements
  - Courses to be completed
- Communications
  - Emails, newsletters and notifications
- Requirements
  - 2014 CMS Broker/Producer Training Guidelines are met in all courses, exams and forms
2014 HCSC/HISC Producer Training & Certification Requirements

2014 CHANGES
2014 Changes

- All producers will now complete a combined PDP/MAPD curriculum
  - Producers will be certified to market, sell and/or service PDP and MAPD products
  - Producers will review amendment for PDP and MAPD compensation changes

- Combined PDP/MAPD Referral Program
  - Offered to producers who choose not to certify and sell PDP and MAPD products
2014 Changes

• All agency principals will have to complete the Rules & Regulations and FWA course and exam
  • 2 courses/exams total
  • Need a 85% to pass each exam
  • Will have 3 opportunities to pass each exam
  • Credit provided for agency courses/exams if principal completes the courses/exams as a subagent

• HCSC will now provide lifetime renewals on PDP and MAPD policies
  • Producers must certify by the renewal deadline to receive lifetime renewals
2014 HCSC/HISC Producer Training & Certification Requirements

COURSES
Sample Topics*

- Reinforce CMS training requirements
- Introduce and explain deadlines
- Review communications

*Topics not all inclusive
Medicare Basics Course

Sample Topics*

- Identify Medicare parts and eligibility requirements
- Types and description of Medicare Plans
- Medicare Part D phases and structure
- Beneficiary Protections

*Topics not all inclusive
Sample Topics*

- Review marketing rules that apply to Medicare plans
- Enrollment Periods
- Enrollment Process

*Topics not all inclusive
Sample Topics*

- Blue Cross MedicareRx and Blue Cross Medicare Advantage specific
  - Plan designs, formulary and pharmacy network
  - Marketing processes (e.g., event reporting)
  - Enrollment
  - Operational processes (e.g., Appeals/Grievances)
  - Available collateral and ordering process
  - Enrollment and billing options
  - Monitoring Program

*Topics not all inclusive
Sample Topics*

- Medicare Plan Amendment description
- FWA definitions and penalties

*Topics not all inclusive
2014 HCSC/HISC Producer Training & Certification Requirements

EXAMS
## Exams

### Quizzes and Challenges and Exams – oh my!

<table>
<thead>
<tr>
<th>Location</th>
<th>Quiz</th>
<th>Challenge</th>
<th>Exam</th>
</tr>
</thead>
<tbody>
<tr>
<td>After each course module</td>
<td>After each course module</td>
<td>At the end of each course</td>
<td>After the Challenge</td>
</tr>
<tr>
<td>Passing Score</td>
<td>85%</td>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td># of attempts to achieve 85%</td>
<td>As many as needed</td>
<td>As many as needed</td>
<td>3</td>
</tr>
<tr>
<td>Random questions pulled from pool</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Exams

- Passing score is **85%** on all exams per CMS guidelines
- Three attempts per exam (4 exams)
- No lockout period
  - Can re-take exam immediately after a failed attempt
- Exam questions are randomly selected; not all questions are the same for each attempt
Exams

• Answer all exam questions
  • The exam will not be submitted unless all questions are answered and the ‘SUBMIT’ button has been selected
  • If a user stops in the middle of an exam and exits the program or is locked out due to inactivity (20 minutes), the exam will not count as long as the ‘SUBMIT’ button was not selected
    • Unlike the courses, the exam will start from the beginning
  • Sales Agent Requirement “course” does not have an associated exam
Exams

Passing score is 85% per exam; 3 attempts per exam

<table>
<thead>
<tr>
<th>Exam Name</th>
<th># of Exam Questions</th>
<th># missed and still meet 85%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicare Basics</td>
<td>25</td>
<td>3</td>
</tr>
<tr>
<td>Medicare Rules &amp; Regulations</td>
<td>35</td>
<td>5</td>
</tr>
<tr>
<td>PDP/MAPD Product</td>
<td>25</td>
<td>3</td>
</tr>
<tr>
<td>Fraud, Waste &amp; Abuse</td>
<td>20</td>
<td>3</td>
</tr>
</tbody>
</table>
2014 HCSC/HISC Producer Training & Certification Requirements

FORMS
Information Form

• Before courses and exams
• Enter
  • Producer name
  • 9-digit HCSC assigned Producer ID #
  • National Producer # (required field)
  • Email address (required field)
  • Phone number
  • State

• Information is used to communicate status of 2014 HCSC/HISC Producer Training & Certification Program requirements
Certification Form

• After courses and exams

• Completes certification portion of the 2014 HCSC/HISC Producer Training & Certification requirements

• Attest to various questions
  • Some responses may initiate a call from Producer Monitoring

• Enter
  • Producer first and last name
  • 9-digit HCSC assigned Producer ID #
  • If applicable: agency name and HCSC assigned agency ID #
Amendment – If Applicable

- Not applicable to all users
  - Individual and Agency Principal users only
- After courses, exams and Certification Form
- Confirms the contract between HISC and producer or agency
  - Includes Compensation
- Enter
  - Producer first and last name
  - 9-digit HCSC assigned Producer ID#
  - If applicable agency name and HCSC assigned agency ID #
To Do Lists
*Please disregard automated Knowledgewire task deadline. HCSC required deadline is Dec. 3, 2013 for subagents and Dec. 6, 2013 for individual producers and agencies.
2014 Individual Producer

- Annual Information Form
- Sales Agent Requirements
- Medicare Basics course
  - Medicare Basics exam
- Medicare Marketing Rules & Regulations course
  - Medicare Marketing Rules & Regulations exam
- PDP/MAPD Product course
  - PDP/MAPD Product exam
- FWA course
  - FWA exam
- Certification Form
  - Medicare Amendment
2014 Subagent

- Annual Information Form
- Sales Agent Requirements
- Medicare Basics course
- Medicare Basics exam
- Medicare Marketing Rules & Regulations course
- Medicare Marketing Rules & Regulations exam
- PDP/MAPD Product course
- PDP/MAPD Product exam
- FWA course
- FWA exam
- Certification Form

**Note:** Subagents are not deemed certified until the Agency Principal completes the agency certification requirements.
2014 AHIP
Individual Producer or Subagent

- Annual Information Form
- Sales Agent Requirements
- PDP/MAPD Product course
- PDP/MAPD Product exam
- FWA course
- FWA exam
- Certification Form
- Medicare Amendment (applicable to individual producers)
2013 Agency Principal

- Annual Information Form
- Sales Agent Requirements
- Medicare Marketing Rules & Regulations course
- Medicare Marketing Rules & Regulations exam
- FWA course
- FWA exam
- Certification Form
- Medicare Amendment
Notification of Certification Completion

• **Message**
  - Confirms completion of all 2014 HCSC/HISC Producer Training & Certification Requirements
  - Includes link to supply portal

• **How**
  - Via email

• **When**
  - Emailed approximately 1-3 business days after certification completion

• **Who**
  - Individual Producers
  - Subagents (only after Agency Principal completes agency requirements)
  - Agency Principal (only after completing their requirements)

Keep copy for records
Notice of Certification Incompletion

- **Message**
  - States there are outstanding items for 2014 HCSC/HISC Producer Training & Certification Requirements
  - One task on the to-do list must be completed to alert a notice of certification incompletion

- **How**
  - Via email

- **When**
  - Approximately 7 days after user begins 2014 HCSC/HISC Producer Training & Certification Program

- **Who**
  - Individual Producers
  - Subagents
  - Agencies
Notice of Agency Amendment Execution

• **Message**
  - Confirms at least one subagent has completed their 2014 HCSC/HISC Producer Training & Certification requirements
  - Outlines principal’s 2014 HCSC/HISC Producer Training & Certification requirements
  - Requires completion within 2 weeks of notification

• **How**
  - Via email

• **When**
  - Emailed approximately 1-3 business days after at least one subagent completes their 2014 HCSC/HISC Producer Training & Certification requirements

• **Who**
  - Agency Principal
Notification of Exam Failure

- **Message**
  - Informs producer they failed one of the exams after three attempts thus failing the certification
  - Cannot market, sell or service 2014 Blue Cross MedicareRx and Blue Cross Medicare Advantage plans
  - Blue Cross MedicareRx and Blue Cross Medicare Advantage book of business (CYs 2011 – 2013) is being moved to HISC house account

- **How**
  - Via certified letter

- **When**
  - Mailed approximately one week after exam failure

- **Who**
  - Individual Producers
  - Subagents
  - Agency Principal
Book of Business Move Notification

• **Message**
  - Due to failure to complete certification requirements your book of business has been moved to the HISC House Account

• **How**
  - Via email and letter

• **When**
  - Mailed in January

• **Who**
  - Individual Producers
  - Agency Principal
Continuing Education Credits
Continuing Education Credits

- **Illinois and New Mexico:**
  - 4 credits approved for individual producers/subagents
  - 2 credits approved for AHIP producers/subagents in Illinois

- **Oklahoma and Texas**
  - 4 credits pending* for individual producers/subagents
  - 2 credits pending* for AHIP producers/subagents

*Credits only apply once the Departments of Insurance (DOI) approves. Upon successful completion of all 2014 requirements, HCSC will submit credits to the respective DOI. Producers should confirm with Department of Insurance to confirm credits are applied.
Additional Information

SM  Service Mark of the Blue Cross and Blue Shield Association, an Association of Independent Blue Cross and Blue Shield Plans

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Blue Cross MedicareRx is a prescription drug plan provided by HCSC Insurance Services Company (HISC), an independent licensee of the Blue Cross and Blue Shield Association. A Medicare-approved Part D sponsor.

Blue Cross Medicare Advantage HMO and HMO POS plans in Illinois and New Mexico and PPO plans in Montana, New Mexico and Oklahoma are provided by Health Care Service Corporation, a Mutual Legal Reserve Company (HCSC). Blue Cross Medicare Advantage Dual Care is an HMO Special Needs Plan provided by HCSC. Blue Cross Medicare Advantage PPO plans in Texas are provided by HCSC Insurance Services Company (HISC). Blue Cross Medicare Advantage HMO and HMO POS plans in Oklahoma are provided by GHS Health Maintenance Organization, Inc. d/b/a BlueLincs HMO (BlueLincs). HCSC, HISC, and BlueLincs are independent licensees of the Blue Cross and Blue Shield Association. HISC and BlueLincs are Medicare Advantage organizations with a Medicare contract. HCSC is a Medicare Advantage organization with a Medicare contract and a contract with the New Mexico Medicaid program.
Questions?