

## Guide to New Broker Certification

### About this program

The Connect for Health Colorado New Broker Certification program is available to Colorado licensed Accident, Health and Life Insurance agents who are new to our Marketplace. The program is designed to ensure that brokers have the essential knowledge and skills necessary to work on the Exchange. Completion of this program will certify the broker for the upcoming Open Enrollment Plan Year only. **Annual recertification is required.** To begin, you complete your profile and will be assigned a role in the LMS system according to the table below:

If you:	Your role is:
Completed <i>New Broker</i> Certification training in the LMS <b>and</b> recertified online during the prior plan year	<b>Returning Broker</b>
Completed <i>New Broker</i> Certification training in the LMS between 9/1/2017 – 8/30/2018	<b>Returning Broker</b>
Completed New Broker Certification in the LMS in a prior year, but <b>did not</b> recertify during prior plan year	<b>New Broker</b>
Have never <i>completed</i> New Broker Certification in the LMS, regardless of the year	<b>New Broker</b>

### Requirements to Certify

To complete this program, the broker must hold a valid Colorado Accident, Health & Life Insurance license (resident or non-resident) and complete *all* of the following components:



#### **New Broker Coursework**

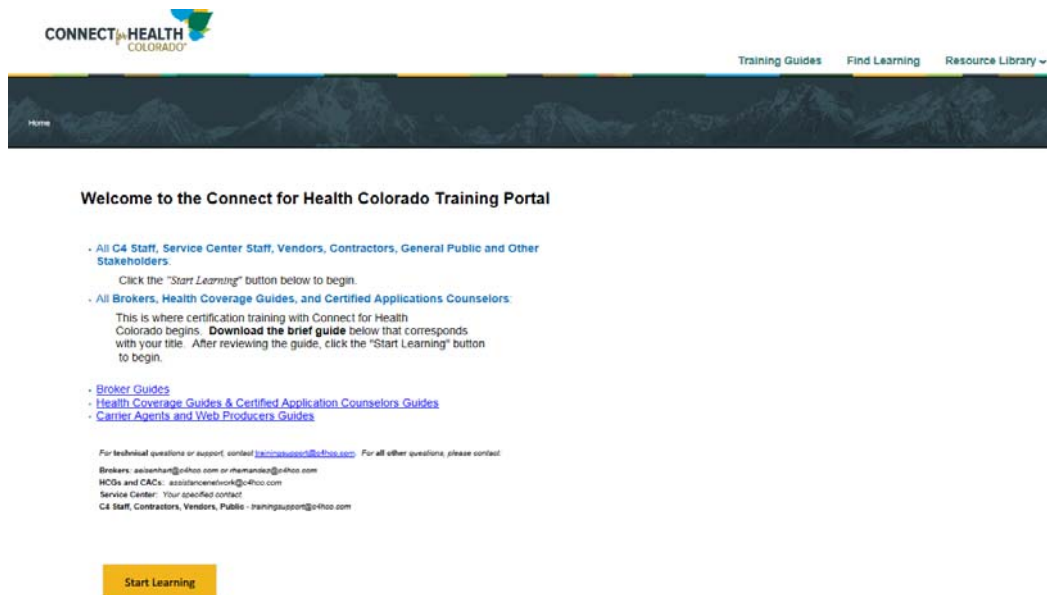
Coursework consists of a comprehensive set of modules, organized topically. To complete a module, go through each slide and take the quiz at the end; a passing score is 80% or higher. Modules and quizzes can be taken an unlimited number of times.



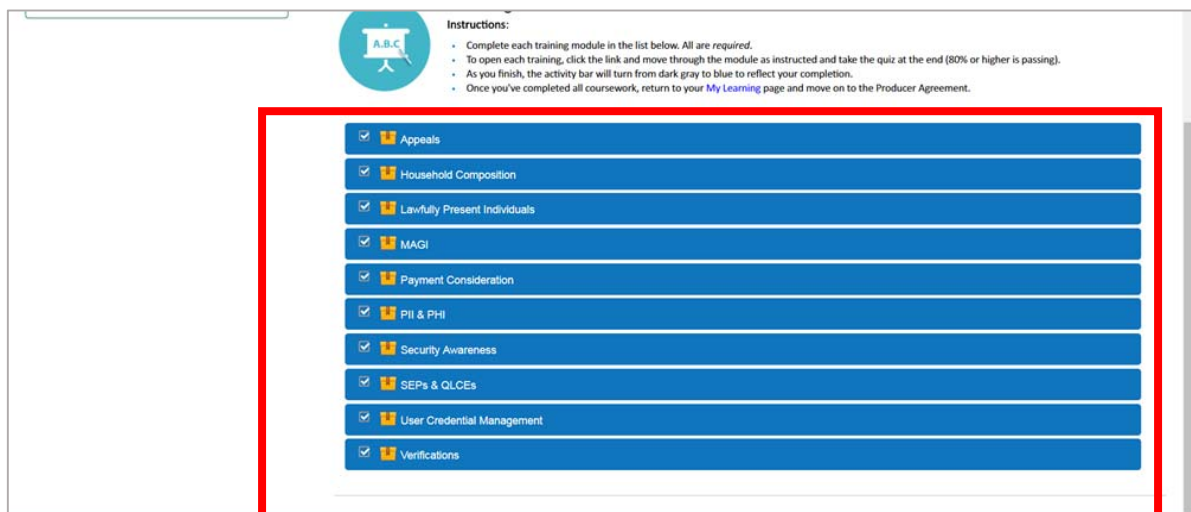
#### **Certified Producer Agreement**

To complete this step, you must review the Certified Producer Agreement document and check the box where indicated to *electronically* sign your agreement.

1. Log on to the Learning Management System (LMS) using the link below.  
Training site - <https://training.connectforhealthco.com>
2. Create an Account (record your username and password for the **Training Site**)
3. Complete your profile accurately with a valid email address as this will be where your certificate of completion will be emailed.
4. To begin coursework, click on the **Start Learning** button in the LMS.



5. **Read the instructions**, then choose a training module. Modules can be taken in any order, and are gray in color until passed when they turn blue.

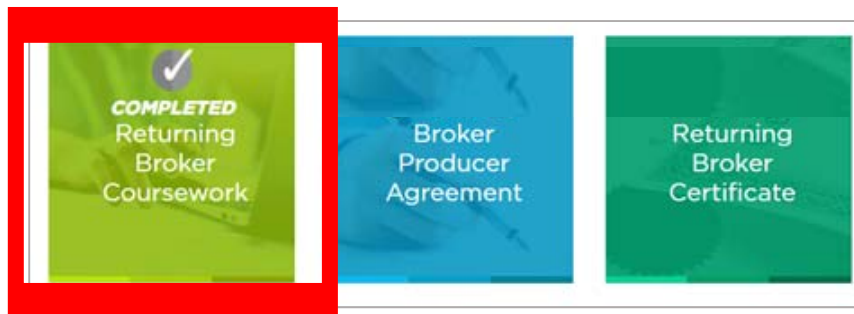


There is a quiz at the end of each module with 10 randomized questions. You must receive a score of **80% or higher** to pass the quiz.

- You may check grade(s) at any time using the *drop-down menu (upper right-hand corner) > Grades*. After viewing your grade click the back button in the browser window to return to the page where all training modules are listed.



- Once all coursework is completed, the *Producers Agreement* icon will be activated and ready for your electronic signature. Notice that completed icons have a checkmark with the word “completed”.



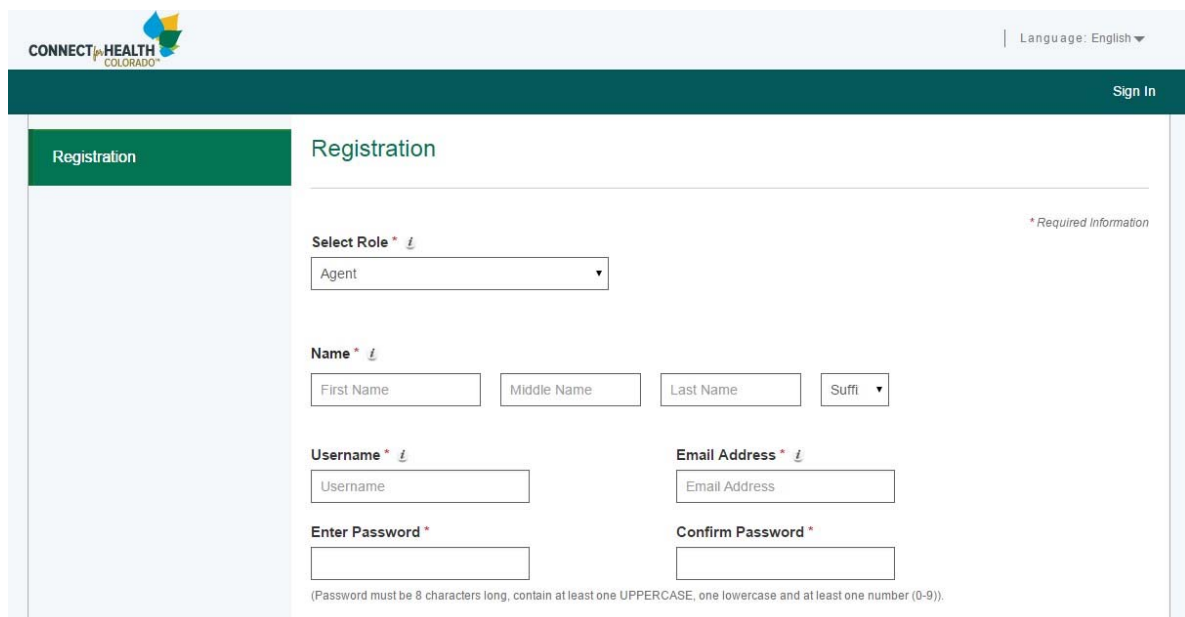
## Next Steps:

### Steps to Creating a Broker Portal Account

Once you have accomplished your certification training in the training portal (LMS), the next step is to create a Broker Portal Account with Connect for Health Colorado. Please note that your broker service portal is **entirely separate** from your training portal account, LOCATED on the marketplace website outside the LMS.

#### How to Create Your Broker Portal Account

1. Using the link <https://prd.connectforhealthco.com>
2. Click on “Register” in the upper right corner; you will be directed to the page below.



3. Select “**Agent**” as your role (this should be the default setting).
4. Complete all information on the Registration page. This will be the information that appears on the website Broker Directory. Create a Username (can never be changed – keep it simple) and Password. **RECORD and keep this information** as you will need it to complete your profile and this will become your permanent login to the Broker Portal.
5. Click both boxes at the bottom of the page and then click the blue Register button in the bottom right-hand corner to complete this section.
6. Once you have registered, you will return to the main “Sign-In” page.
7. Use the Username and Password you just created to login and complete your Profile. You must complete all required fields noted with the red (\*) asterisk.

*\*Be as accurate as possible when completing the information as many of these fields will be locked and not able to be changed once the account has been activated.*

## Special Instructions to Complete your Profile

- Enter BOTH your name as it appears on your license
- Enter Agency/Company – this may simply be your name if you are an independent broker
- Website URL: this will be the only opportunity to enter this. Once the page is saved, you will no longer be able to edit the website field.
- Colorado License number MUST be your individual license number – NO letters or leading “000”s.
- A TIN (Tax Identification Number) or SSN (Social Security number) must be entered. This must match your appointment with all carriers and will be the number used for commissions by the carriers.
- A second phone number must be entered. If you don’t have one, repeat the primary phone number
- Enter hours of Operation (working hours)
- Click to Agree to the Terms and Conditions and click “save”.

## Final Step: Account Activation

After completing your account set-up and logging in, you will receive a notice that you are not yet approved to work in the Marketplace. To activate your account: Email Broker Team at [BrokerTeam@C4hco.com](mailto:BrokerTeam@C4hco.com) notifying us that your account has been created. Attach copies of your Connect for Health New Broker Certificate (from the training site) and your valid Colorado Accident, Health and Life license. After your credentials have been verified, you will receive an email that your Broker Portal account is active and ready to use.

### Contact Us:



*If you experience any difficulties while in the LMS such as improper page loading, video malfunction etc. contact [trainingsupport@c4hco.com](mailto:trainingsupport@c4hco.com) . This email is monitored closely and issues will be acknowledged in a timely manner.*

*If you have questions regarding certification requirements, contact the Broker Team at [BrokerTeam@c4hco.com](mailto:BrokerTeam@c4hco.com).*

---