

ACA Navigator/Assister training requirements:

A set of training standards, to be met by all entities and individuals carrying out Navigator functions under the terms of a Navigator grant, to ensure expertise in:

- (i) The needs of underserved and vulnerable populations
- (ii) Eligibility and enrollment rules and procedures
- (iii) The range of QHP options and insurance affordability programs; and
- (iv) The privacy and security standards applicable under 155.260.

Other Navigator requirements that relate to training needs:

- Provide information in a manner that is culturally and linguistically appropriate
- Accessibility and usability for individuals with disabilities

Navigator/Assister Training

Exchange-wide Training Approach

- Core training modules are being developed that apply to all groups (staff, call center, navigator/assisters, agency partners)
- Each “program” supplements core training as needed to address program-specific business processes
- Core training modules being drafted by subject matter experts (Navigator team, Operations, HCA/Medicaid, OIC, etc.)

Navigator/Assister Progress to date

- Established a work group consisting of a broad group of stakeholders and partners
- Identified guidelines for Navigator core knowledge, skills, competencies
- Identified training “modules”
 - Estimate approximately 40-50 total training hours (core and Navigator-unique)
 - Prioritization and sequencing
 - Training format(s)
- Timeline

Lead Organization responsibilities (as outlined in RFP)

- Screen In-Person Assister candidates (using core competency guidelines)
- Receive training from Exchange
- Train In-Person Assisters in their service area
- Notify the Exchange when a candidate has completed training and is ready to be scheduled for certification exam

Certification Exam for Navigators/Assisters

- Exchange administers exam electronically
- Upon successful completion, issue certificate, notification, and sets up system access in the Healthplanfinder

Next Steps:

- Start building introductory (non-system) courses – Countdown to Coverage
- Review core curriculum for Navigator/IPA input
- Set up learning management system to track In-Person Assister training and certification
- Content review for Exchange “core” training

Assister Training Timeline								
	March	April	May	June	July	August	September	October
Select Lead Orgs	RFP out March 8		Lead Organizations Chosen		Contracts with Navigator organizations in place			
Develop Healthplanfinder	Testing on-going through August						Input Final Content on plans	
Develop training content	Content manuals due from content experts June 1			Develop manuals (self-help, practice tests, reading levels, etc), PowerPoints, recorded webinars and practice modules with Finder				
Train HBE training staff (Chris Brown)	Countdown to Coverage				July 7th - August 2nd			
Train Lead Organization						August 12 - 20		
Lead organizations train and Certify Navigators.							Train & Certify Assisters	

COUNTDOWN TO COVERAGE RECORDED WEBINARS

Topic	Lead	Review Date	Delivery Date	Scenarios from WG member
1. ACA 101 – Big picture	Chris	April 5	April 26	
APTC/CSR				
Medicaid Expansion				
2. Exchange	Shaina	April 5	May 10	
Security and Privacy				
PHI				
HIPAA Compliance				
3. Insurance 101	Scott/Kris	April 12	May 24	
4. Medicaid 101	Chris	April 12	June 7	
MAGI				
CHIP/Apple Health				

Classic Medicaid				
5. SHOP	Scott/Kris	April 5	June 21	
Employee				
Employer				
6. Customer Service	TBD	April 26	July 12	
Call Center				
In-Person Assisters/Navigators				
Agents/Brokers				
			Repeat series or add topics as Q and A highlights them	
			Go into greater detail as we get closer to 10/1.	

Core Training Topics

TOPIC	ORDER of MODULES
ACA 101 – Big picture includes	
Medicaid expansion	
Glossary of Terms	
Exchange Overview	
Program Access (Language, disability, etc.) (Either as part of Exchange Overview or as separate module tbd)	
Security and Privacy includes:	
PHI	
Authorized Representatives	
Appeals	
Validating Identity	
Medicaid 101	
Medicaid Expansion	
MAGI 101	
Referral process	
Conversion process	

Classic Medicaid	
Qualified Health Plans	
Health insurance basics	
QHP basics (plan components, plan options, plan selection tools)	
Subsidies (Tax credits, cost reductions)	
Costs	
Consumer Assistance (Roles, functions, responsibilities, requirements, referrals)	
SHOP/Agent/Broker	
Navigators/in person assisters	
Call Center	
Healthplanfinder System Admin/account creation	No need to specify
Application-Eligibility (System and business rules)	
Enrollment (System and business rules, including premium payments)	
Correspondence	

HBE RFP 13-001 Appendix F
In-Person Assister Knowledge, Skills, and Competencies Guidelines

* Competency = the ongoing ability to maintain, update and demonstrate sufficient knowledge, skills, judgment, and qualifications necessary to practice safely and ethically in a designated role and setting in accordance with In-Person Assister requirements. One achieves continuing competency through active practice, self-assessment and reflection, and continuing education.

Knowledge	Skills	Competencies*	Qualities
Relationships			
	<ul style="list-style-type: none"> • Create a safe place for people to discuss health issues • Understand and Articulate client needs including people with low socioeconomic status, Limited English Proficiency, disabilities 	<ul style="list-style-type: none"> • Ability to communicate effectively with lay people, people with disabilities, Limited English Proficiency, low-socioeconomic, chronic conditions • Fluency in population served • Effective Customer service skills • Listening Skills • Problem solving • Conflict Resolution – maintain control under difficult situations • Ability to speak in language that lay people, people with disabilities, Limited English Proficiency, low-socioeconomic, chronic conditions status can understand 	<ul style="list-style-type: none"> • Relationship with community being served. • Understanding of the special enrollment conditions for American Indians and Alaskan Natives • Desire to help community • Commitment to assure access to hard to serve and hard to reach individuals and groups

Content:			
<ul style="list-style-type: none"> • Public and private health insurance • ACA and the Health Benefit Exchange (HBE) • Qualified Health Plans (QHP) Premium subsidies and how they are calculated • Penalties for opting out of insurance coverage • Bronze, Silver, Gold and Platinum tiers • Health Plan Quality metrics • IRS information related to the HBE • Privacy/Security • Authorized representatives under state and federal law • How the Healthplanfinder works 	<ul style="list-style-type: none"> • Use Health information technology • Explain insurance information 	<ul style="list-style-type: none"> • Computer skills • Data collection skills (use HBE metrics) • Ability to speak in language that lay people, people with disabilities, Limited English Proficiency, low-socioeconomic, chronic conditions status can understand • Ability to communicate effectively with that lay people, people with disabilities, Limited English Proficiency, low-socioeconomic, chronic conditions 	
Referral			
<ul style="list-style-type: none"> • Role of In-Person Assister, Agent-Broker, Call Center • Pass off points between groups. The correct parties to direct people to, in what circumstances. • Limit to In-Person Assister's role 	<ul style="list-style-type: none"> • Refer people to Agent-Broker • Refer people to services for additional health resources and information 	<ul style="list-style-type: none"> • Communication Skills • Computer Skills 	

Resources available to improve skills/competencies:

(Disclaimer: HBE does not require these courses and there is no implied HBE endorsement or guarantee regarding the quality and content.)

Computer skills: Microsoft Digital Literacy: **First Course**

This e-learning course can be played online or downloaded to be played on a local machine. It begins with friendly videos that explore how computers are an essential part of school, work, and modern life. The course then provides hands-on lessons about using the mouse and keyboarding. Offered in multiple languages.

<http://www.microsoft.com/about/corporatecitizenship/citizenship/giving/programs/up/digitalliteracy/default.aspx>

Training options for individuals to expand their competency skill set:

- Department of Health: <http://chwtraining.net/sites/default/files/spiritweb/documents/WashingtonCHWFactSheet.pdf>
- Whatcom Community College. CWoods@whatcom.ctc.edu Whatcom Community College (WCC). WCC has developed an 11 hour Introduction to Community Health Worker course.
- Clark College. Developing an AA degree program for Community Health Workers. Mark Gaither is heading the effort. MGaither@clark.edu
- The Washington State Community Action Partnership has a certified training program covering core competencies. <http://www.wapartnership.org/what-we/family-development/>