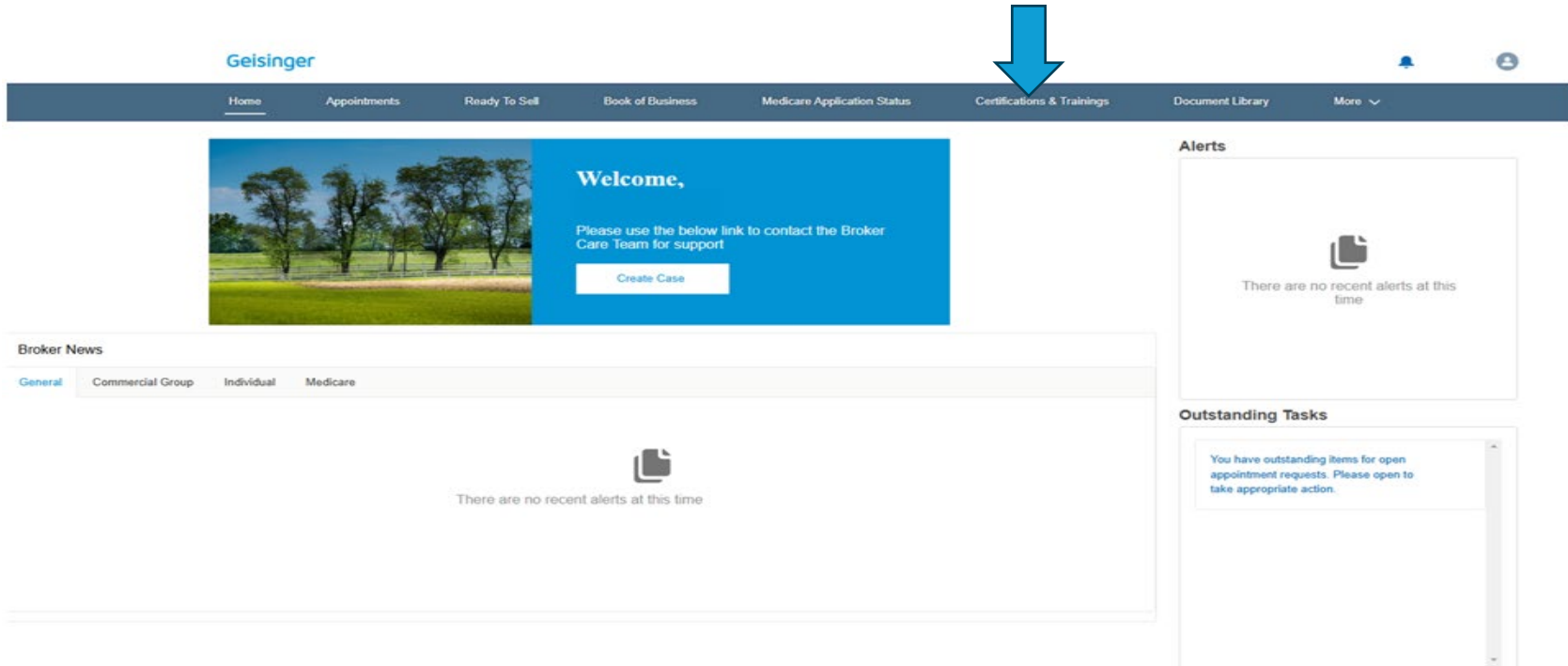


Once you are logged into the Broker portal in CHROME Browser, you proceed to Step 1.

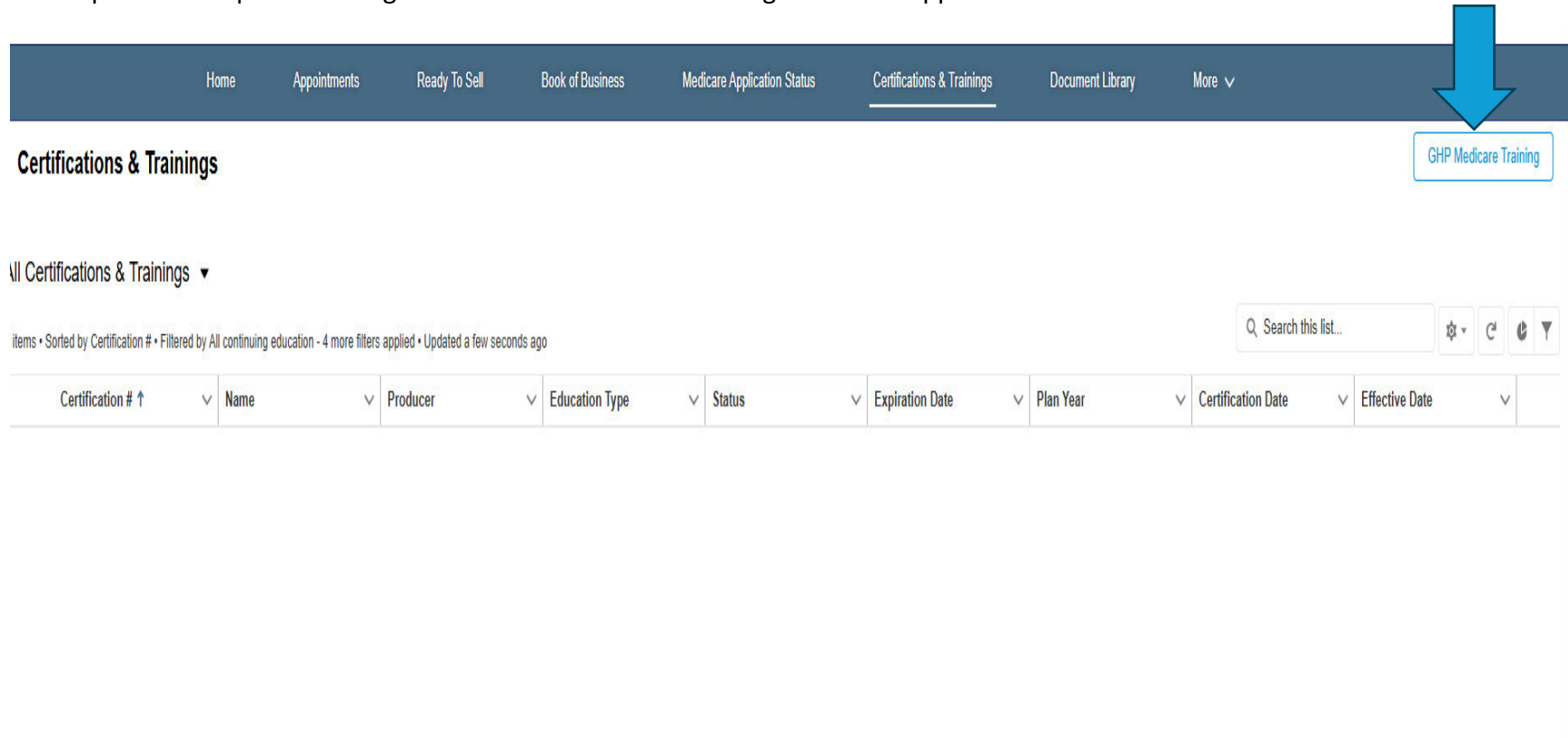
**Note: If you are not able log in, please see the handout on Broker Portal Log in Process.**

**\*\*\*REMINDER: All appointed brokers are required to complete the mandatory Medicare training annually by December 15<sup>th</sup>, as well as all AHIP Training and Certificates must be submitted by this date. There will be no exceptions. Follow steps to learn how to verify you are Ready to Sell Annually. \*\*\***

**STEP 1:** Once in Broker portal home page. Navigate to the **"Certifications & Trainings"** Tab in the menu Bar.



**Step 2:** Click on the tab and you will be navigated to the **"Certifications & Trainings"** page in the Broker Portal. To complete the required Medicare training, please click **"GHP Medicare Training"** on the top right side. You will be navigated to the Litmos website to complete the required Geisinger Health Plan Medicare training to Remain appointed.

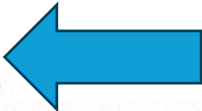


The screenshot shows the 'Certifications & Trainings' page in the Broker Portal. The navigation bar at the top includes links for Home, Appointments, Ready To Sell, Book of Business, Medicare Application Status, Certifications & Trainings (which is the active page), Document Library, and More. A blue arrow points to a button labeled 'GHP Medicare Training' in the top right corner. Below the navigation bar, the page title 'Certifications & Trainings' is displayed. A dropdown menu shows 'All Certifications & Trainings'. Below this, there is a search bar with the text 'Search this list...' and several icons for settings, refresh, and filters. A table header is visible with columns: Certification # (sorted ascending), Name, Producer, Education Type, Status, Expiration Date, Plan Year, Certification Date, and Effective Date. The table body is currently empty.

**Step 3:** You can **verify** if your Medicare Training and AHIP (Fraud, Waste, Abuse) Training is completed and on your record in the Broker Portal. Make sure you update the list view on the left side, to “My Certifications & Trainings”, then all the recorded will appear, and you can verify if all is completed. If a training is missed, proceed to Step 4.

Home Appointments Ready To Sell Book of Business Medicare Application Status Certifications & Trainings Document Library More ▾

### Certifications & Trainings GHP Medicare Training

**My Certifications & Trainings ▾** 

0 items • Sorted by Plan Year • Filtered by All continuing education - 4 more filters applied • 13

⊗ ↻ ⌵

	Education Type	Status	Expiration Date	Plan Year ↓	Certification Date	Effective Date	
1	2025 MA training	Active	12/31/2025	2025	8/22/2024	1/1/2025	▾
2	Medicare FWA Certification 2025	Active	12/31/2025	2025	6/26/2024	1/1/2025	▾
3	Medicare FWA Certification 2024	Expired	12/31/2024	2024	7/18/2023	1/1/2024	▾
4	2024 Medicare Training	Expired	12/31/2024	2024	7/27/2023	1/1/2024	▾
5	2023 AHIP	Expired	12/31/2023	2023	6/23/2022	1/1/2023	▾

**Step 4:** If your AHIP certification is missing, you can Create a Case, that will be sent directly to the Broker Operations team and attach your AHIP Certificate to the case, so your record can be updated. Navigate to the **"HOME"** Tab on the blue menu bar and click on the **"Create Case"** button in the blue box.

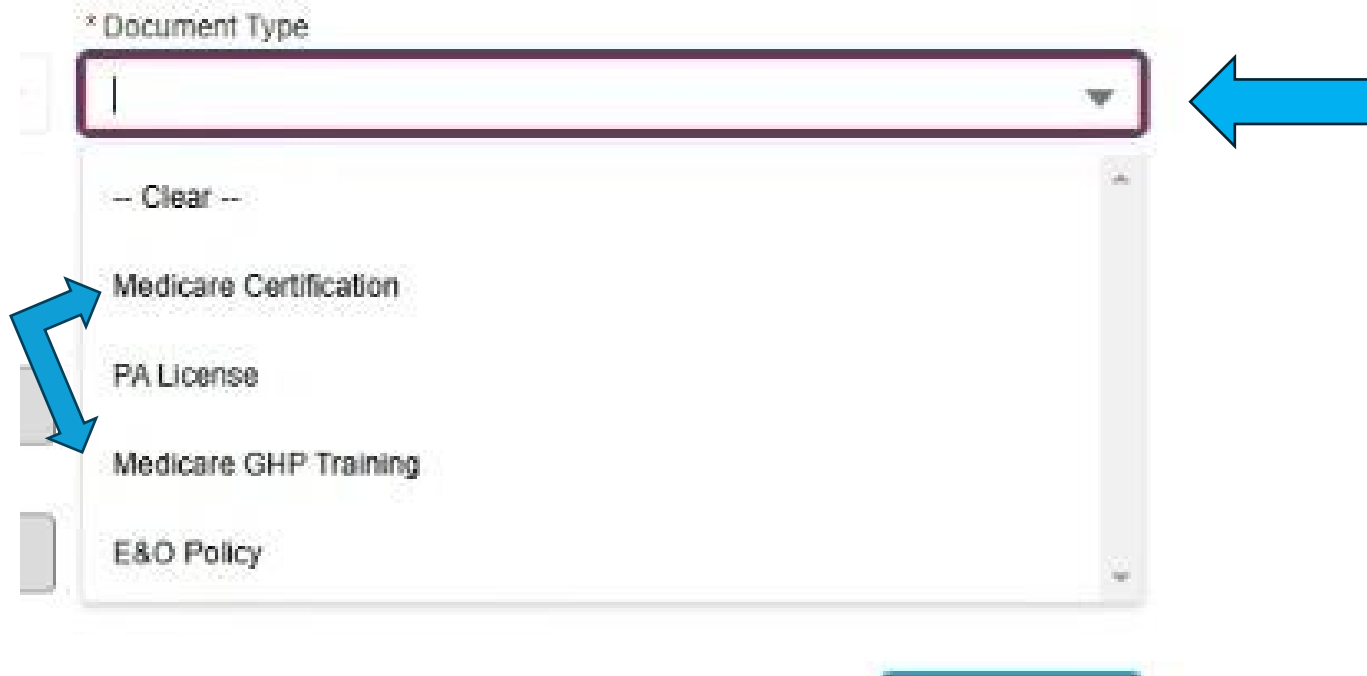
The screenshot shows a web application interface. At the top is a dark blue navigation bar with the following tabs: Home, Appointments, Ready To Sell, Book of Business, Medicare Application Status, Certifications & Trainings, Document Library, and More. A blue arrow points down to the 'Home' tab. Below the navigation bar is a large blue box containing a landscape image of trees and a 'Welcome,' message. The text inside the blue box reads: 'Please use the below link to contact the Broker Care Team for support' and features a white 'Create Case' button. A blue arrow points up to this button. To the right of the main content area are two panels: 'Alerts' and 'Outstanding Tasks'. The 'Alerts' panel shows a document icon and the text 'There are no recent alerts at this time'. The 'Outstanding Tasks' panel shows a message: 'You have outstanding items for open appointment requests. Please open to take appropriate action.'

**Step 5:** Once click on “Create Case” button on the home page it will navigate you to the cases setup page. Select Record Type, and Choose **“New Document”**, and proceed to Step 6.

The screenshot displays the Geisinger web application interface. At the top left is the Geisinger logo. A dark blue navigation bar contains the following menu items: Home, Appointments, Ready To Sell, Book of Business, Medicare Application Status, Licenses, Certifications & Trainings, and More. On the right side of the navigation bar are a notification bell icon and a user profile icon. The main content area is titled 'Case Type' and features a dropdown menu labeled '\* Record Type'. The dropdown is open, showing options: -- Clear --, Broker Request, Customer Related Request, New Document (highlighted in blue), and Admin Management. A large teal arrow points to the 'New Document' option. Below the dropdown is a 'Requestor' field with a blue button. To the right of the main form is a 'Steps' sidebar with a vertical list: Case Type (selected with a blue circle), Case Details, and Upload Documents. At the bottom right of the main form is a blue 'Next' button. A blue arrow points to the left side of the dropdown menu.

**Step 6:** Under the **“Document Type”**, choose **“Medicare Training”** for AHIP Certificate or **“Medicare GHP training”** for Litmos Certificate. Click the Next” Button to proceed.

\* Document Type



The image shows a web form with a dropdown menu labeled '\* Document Type'. The dropdown is currently empty, showing a vertical line and a downward arrow. A blue arrow points to the dropdown box from the right. Below the dropdown, a list of options is visible: '-- Clear --', 'Medicare Certification', 'PA License', 'Medicare GHP Training', and 'E&O Policy'. A blue arrow points to the 'Medicare GHP Training' option from the left.

- Clear --
- Medicare Certification
- PA License
- Medicare GHP Training
- E&O Policy

**Step 7:** Complete the Subject and Description section as you would an email, click the “Next” button.

Home Medicare Application Status Book of Business Ready To Sell Certifications & Trainings Document Library Service Requests

### Case Details

\*Case Origin: Broker Portal      \*Status: New

\*Subject:

\*Description:

Cancel      Previous      Next

### Steps


- Case Type
- Case Details**
- Upload Documents

**Step 8:** Upload the document and click the **Submit** button.

### Upload Documents

Please upload the file here.

[Upload Files](#) Or drop files

 Upload Documents is Required.

[Cancel](#) [Previous](#) [Submit](#)

#### Steps

- ✓ Case Type
- ✓ Case Details
- Upload Documents**

**Step 9:** To confirm that you are Ready to Sell for each plan year, go to the **“Ready to Sell”** tab on the blue menu bar, and on the left side list view, select **“Current Year Medicare”** or **“Next Year Medicare”**, and you can verify with a **“Yes or No”** that you are ready to sell for each plan year.



## Ready To Sell

[Export List](#)

Current Year Medicare ▾

1 item • Sorted by Ready To Sell Name • Filtered by All ready to sell - 4 more filters applied • Updated a few seconds ago

Ready To Sell Name ↑ ▾	Broker ID ▾	NPN ID ▾	Agency Name ▾	Period ▾	Plan Year ▾	Ready to Sell(Me... ▾	PA License ▾	FWA (Medicare) ▾	GHP (Medicare) ▾	
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