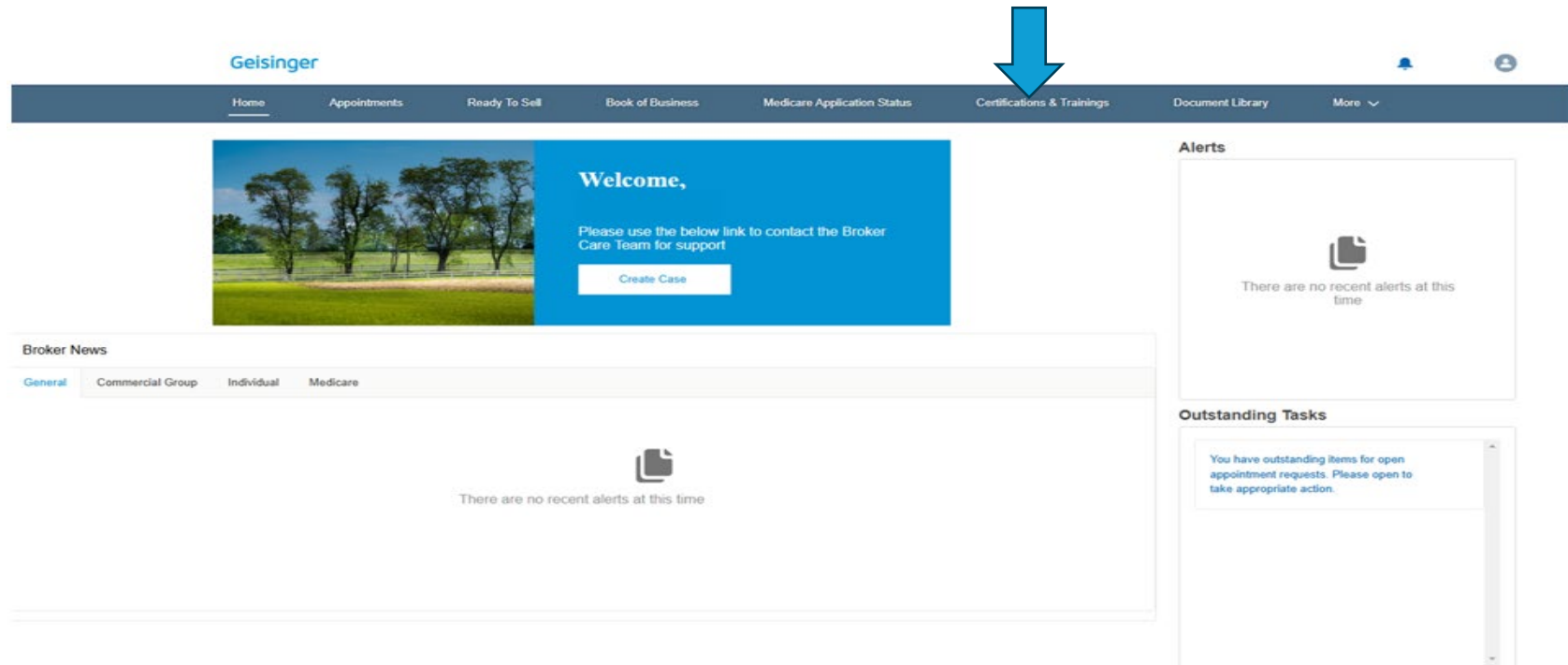


Once you are logged into the Broker portal in CHROME Browser, you proceed to Step 1.

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 15th, 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.

HomeAppointmentsReady To SellBook of BusinessMedicare Application StatusCertifications & TrainingsDocument LibraryMore ▾

Certifications & Trainings

⌵ All Certifications & Trainings ▾

items • Sorted by Certification # • Filtered by All continuing education - 4 more filters applied • Updated a few seconds ago

Q Search this list...

⚙️ ↺ 🗑️ ▾

Certification # ↑ ▾	Name ▾	Producer ▾	Education Type ▾	Status ▾	Expiration Date ▾	Plan Year ▾	Certification Date ▾	Effective Date ▾	
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↓

GHP Medicare Training

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 ▾

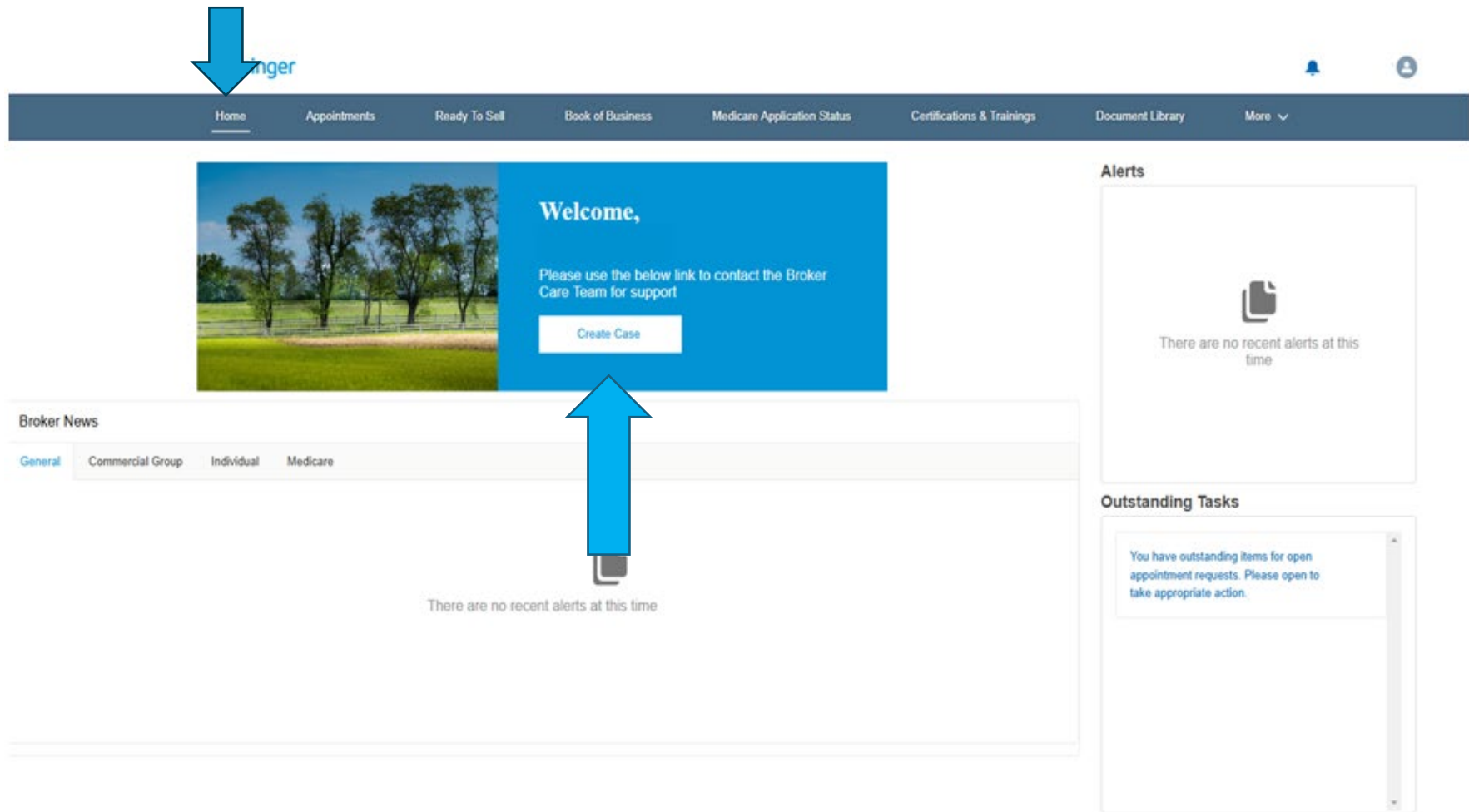
8 items • Sorted by Plan Year • Filtered by All continuing education - 4 more filters applied • 13

Name
1 2025 MA training
2 Medicare FWA Certification 2025
3 Medicare FWA Certification 2024
4 2024 Medicare Training
5 2023 AHIP

Q Search this list...

Education Type	Status	Expiration Date	Plan Year ↓	Certification Date	Effective Date	
Medicare GHP Training	Active	12/31/2025	2025	8/22/2024	1/1/2025	▾
Medicare FWA Certification	Active	12/31/2025	2025	6/26/2024	1/1/2025	▾
Medicare FWA Certification	Expired	12/31/2024	2024	7/10/2023	1/1/2024	▾
Medicare GHP Training	Expired	12/31/2024	2024	7/27/2023	1/1/2024	▾
Medicare FWA Certification	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 displays the Broker News 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 with a landscape image on the left and text on the right that reads 'Welcome,' followed by 'Please use the below link to contact the Broker Care Team for support' and a 'Create Case' button. A blue arrow points up to this 'Create Case' button. To the right of the main content area are two panels: 'Alerts' and 'Outstanding Tasks'. The 'Alerts' panel shows '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.

Geisinger

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

Case Type

* Record Type

-- Clear --

Broker Request

Customer Related Request

New Document

Admin Management

Requestor

Next

Steps

- Case Type
- Case Details
- Upload Documents

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

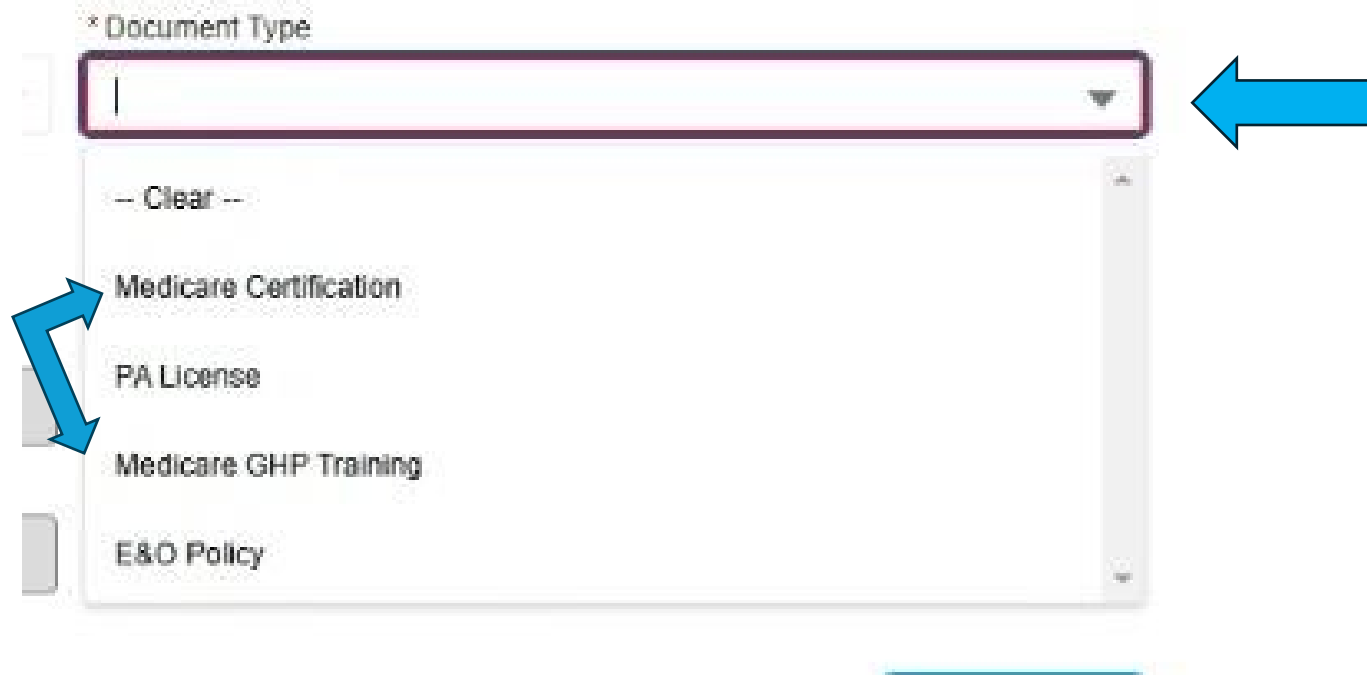
— Clear —

Medicare Certification

PA License

Medicare GHP Training

E&O Policy



The image shows a web form with a dropdown menu labeled '* Document Type'. The dropdown is open, showing a list of options: '— Clear —', 'Medicare Certification', 'PA License', 'Medicare GHP Training', and 'E&O Policy'. A blue arrow points to the dropdown arrow on the right side of the input field. Another blue arrow points to the 'Medicare GHP Training' option in the list. Below the dropdown, there is a blue horizontal line.

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.

[Home](#)[Medicare Application Status](#)[Book of Business](#)[Ready To Sell](#)[Certifications & Trainings](#)[Document Library](#)[Service Requests](#)[Collateral](#)

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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